

Medical Inventory Management

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College Code: bru30

TEAM ID: NM2025TMID26853

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1. INTRODUCTION

1.1 Project Overview

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



1.2 Purpose:

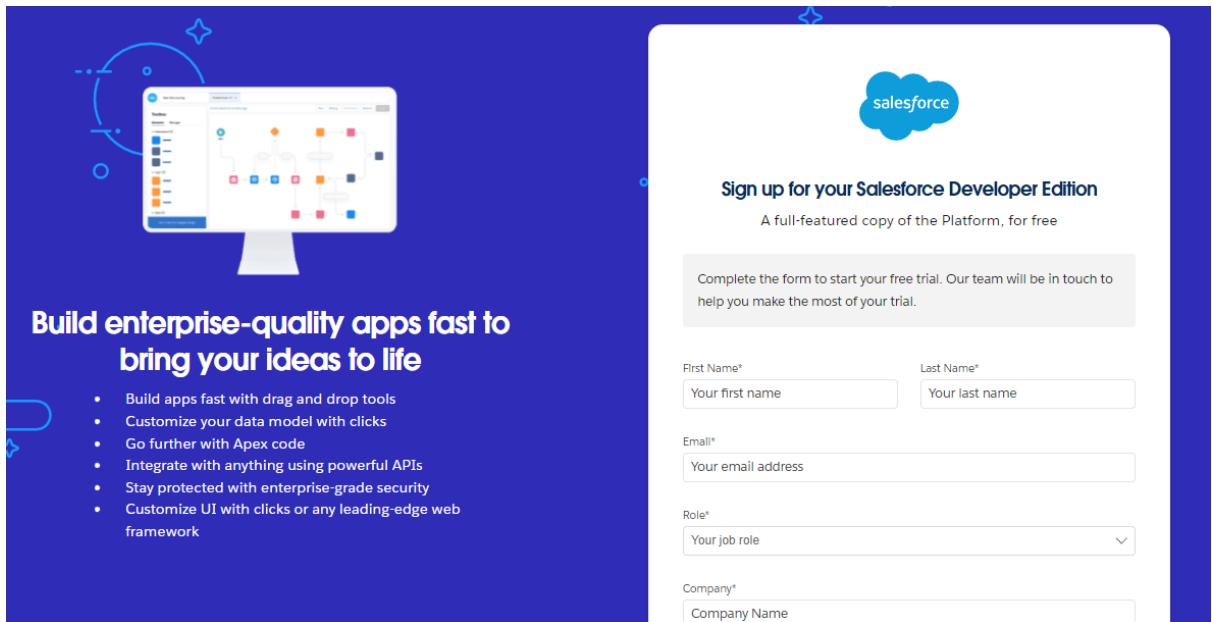
The main objective of the project is to provide a centralized system that helps healthcare organizations efficiently track, control, and optimize their medical supplies and equipment. It ensures real-time visibility of stock levels, prevents shortages or overstocking, and reduces waste by monitoring expiry dates and usage patterns. By automating processes such as reordering, alerts, and reporting, it saves time and lowers costs while also supporting regulatory compliance through accurate record-keeping. Ultimately, effective medical inventory management improves patient care by ensuring that essential medicines and equipment are always available when needed.

DEVELOPMENT PHASE

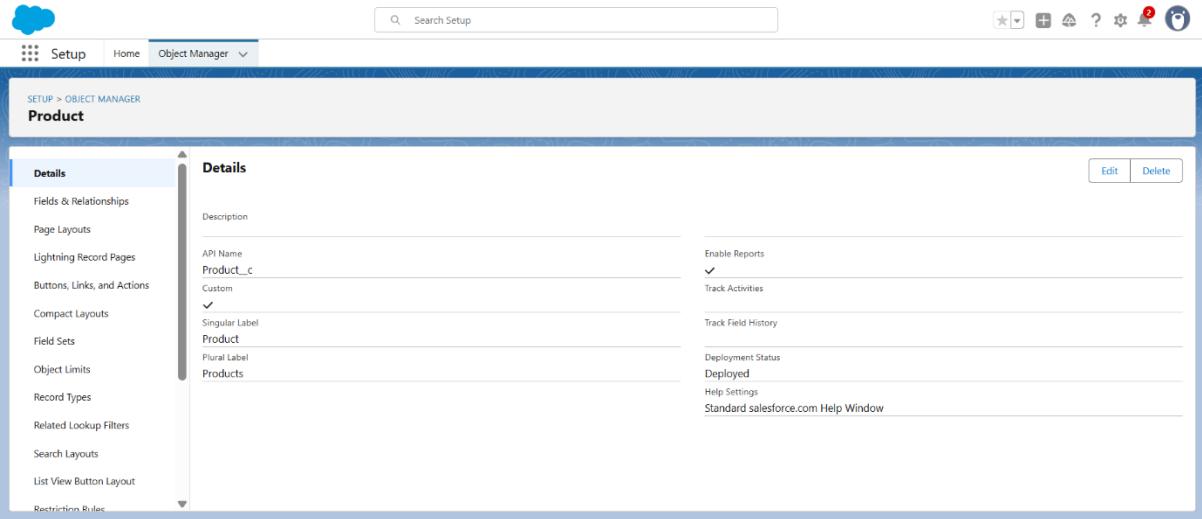
Creating Developer Account:

By using this URL –

<https://www.salesforce.com/form/developer-signup/?d=pb>

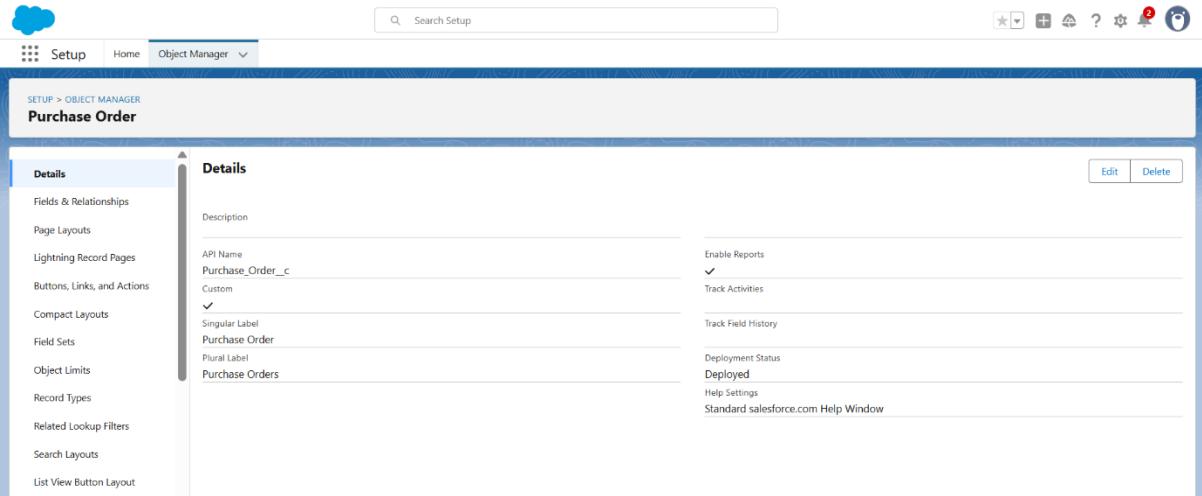


- Created objects: Product, Purchase Order, Order Item, Inventory Transaction and Supplier objects.



The screenshot shows the Salesforce Setup interface with the 'Object Manager' selected. The main title is 'Product'. On the left, there's a sidebar with options like 'Fields & Relationships', 'Page Layouts', 'Lightning Record Pages', etc. The right panel is titled 'Details' and contains fields for 'Description', 'API Name' (set to 'Product__c'), 'Custom' (checked), 'Singular Label' (set to 'Product'), and 'Plural Label' (set to 'Products'). It also includes sections for 'Enable Reports' (checked), 'Track Activities', 'Track Field History', 'Deployment Status' (set to 'Deployed'), and 'Help Settings'.

➤ Purchase Order Object



The screenshot shows the Salesforce Setup interface with the 'Object Manager' selected. The main title is 'Purchase Order'. The left sidebar has similar options as the Product setup. The right panel is titled 'Details' and contains fields for 'Description', 'API Name' (set to 'Purchase_Order__c'), 'Custom' (checked), 'Singular Label' (set to 'Purchase Order'), and 'Plural Label' (set to 'Purchase Orders'). It includes sections for 'Enable Reports' (checked), 'Track Activities', 'Track Field History', 'Deployment Status' (set to 'Deployed'), and 'Help Settings'.

➤ Order Item Object



Setup Home Object Manager

SETUP > OBJECT MANAGER
Order Item

Details

Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout

Details

Description
API Name: Order_Item__c
Custom: ✓
Singular Label: Order Item
Plural Label: Order Items

Enable Reports: ✓
Track Activities
Track Field History
Deployment Status: Deployed
Help Settings: Standard salesforce.com Help Window

Edit Delete

Inventory Transaction Object



Setup Home Object Manager

SETUP > OBJECT MANAGER
Inventory Transaction

Details

Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout

Details

Description
API Name: Inventory_Transaction__c
Custom: ✓
Singular Label: Inventory Transaction
Plural Label: Inventory Transactions

Enable Reports: ✓
Track Activities
Track Field History
Deployment Status: Deployed
Help Settings: Standard salesforce.com Help Window

Edit Delete

Supplier Object



Setup Home Object Manager

SETUP > OBJECT MANAGER
Supplier

Details

Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout

Details

Description
API Name: Suppliers__c
Custom: ✓
Singular Label: Supplier
Plural Label: Suppliers

Enable Reports: ✓
Track Activities
Track Field History
Deployment Status: Deployed
Help Settings: Standard salesforce.com Help Window

Edit Delete

- Created tabs: Product, Purchase Order, Order Item, Inventory Transaction and Supplier objects.

The screenshot shows the Salesforce Setup interface under the 'Tabs' section. The 'Custom Tabs' section is active, displaying a table of custom object tabs:

Action	Label	Tab Style	Description
Edit Del	Inventory Transactions		Alarm clock
Edit Del	Order Items		Airplane
Edit Del	Products		Airplane
Edit Del	Products		Bell
Edit Del	Purchase Orders		Airplane
Edit Del	Suppliers		Alarm clock

Below this, there are sections for 'Web Tabs' and 'Visualforce Tabs', both of which are currently empty.

- Creating a Lightning App for Medical Inventory Management.

The screenshot shows the 'App Details & Branding' tab of the App Builder interface. The 'App Details' section contains fields for 'App Name' (Medical Inventory Management), 'Developer Name' (Medical_Inventory_Management), and 'Description' (Medical Inventory Management). The 'App Branding' section includes fields for 'Image' (a placeholder image of medical inventory items), 'Primary Color Hex Value' (#0070D2), and an 'Org Theme Options' checkbox. The 'App Launcher Preview' section shows a preview of the app icon and name. At the bottom are 'Cancel' and 'Save' buttons.

The screenshot shows the 'Lightning Experience App Manager' interface. On the left, there's a sidebar with various setup links like 'Setup Home', 'Salesforce Go', etc. The main area displays a table of 27 items, sorted by app name. The columns include 'App Name', 'Developer Name', 'Description', 'Last Modified ...', 'App Ty...', and 'Visible...'. One row, 'Medical Inventory Management', is highlighted with a blue border.

App Name	Developer Name	Description	Last Modified ...	App Ty...	Visible...
Content	Content	Salesforce CRM Content	9/1/2025, 7:35 PM	Classic	✓
Data Cloud	Audience360	Build a thorough and complete understanding of your customers.	9/1/2025, 7:35 PM	Lightning	✓
Data Manager	DataManager	Use Data Manager to view limits, monitor usage, and manage recipes.	9/1/2025, 7:35 PM	Lightning	✓
Digital Experiences	SalesforceCMS	Manage content and media for all of your sites.	9/1/2025, 7:35 PM	Lightning	✓
Lightning Usage App	LightningInstrumentation	View Adoption and Usage Metrics for Lightning Experience	9/1/2025, 7:35 PM	Lightning	✓
Marketing CRM Classic	Marketing	Track sales and marketing efforts with CRM objects.	9/1/2025, 7:35 PM	Classic	✓
Medical Inventory Management	Medical_Inventory_Management	Medical Inventory Management	9/9/2025, 1:41 AM	Lightning	✓
My Service Journey	MSIApp	Discover new customer service capabilities.	9/1/2025, 7:35 PM	Lightning	✓
Platform	Platform	The fundamental Lightning Platform	9/1/2025, 7:35 PM	Classic	✓
Queue Management	QueueManagement	Create and manage queues for your business.	9/1/2025, 7:35 PM	Lightning	✓
Sales	Sales	The world's most popular sales force automation (SFA) solution	9/1/2025, 7:35 PM	Classic	✓
Sales	LightningSales	Manage your sales process with accounts, leads, opportunities, and more	9/1/2025, 7:35 PM	Lightning	✓

➤ Created a Text Field, Text Area Field, Number Field, Currency Field, Date Field in Product Object.

The screenshot shows the 'Object Manager' for the 'Product' object. The left sidebar lists various setup categories. The main area shows the 'Fields & Relationships' section, which contains 10 items. Each item has a field label, a name, and a type. For example, 'Current Stock Level' is a Number(18, 0) field, and 'Expiry Date' is a Date field.

Field Label	Name	Type
Current Stock Level	Current_Stock_Level__c	Number(18, 0)
Expiry Date	Expiry_Date__c	Date
Last Modified By	LastModifiedById	Lookup(User)
Minimum Stock Level	Minimum_Stock_Level__c	Number(18, 0)
Owner	OwnerId	Lookup(User,Group)
Product Description	Product_Description__c	Text Area(255)
Product ID	Name	Text(80)
Product Name	Product_Name__c	Text(255)
Unit Price	Unit_Price__c	Currency(16, 2)

➤ Created a Text Field, Lookup relationship, Date Field, Roll-up summary Field, Currency field in Purchase Order Object.

The screenshot shows the Salesforce Object Manager interface for the 'Purchase Order' object. The left sidebar includes options like Setup, Home, and Object Manager. The main area displays the 'Fields & Relationships' section, which lists 10 items sorted by field label. The fields are:

Actual Delivery Date	Actual_Delivery_Date__c	Date
Created By	CreatedBy	Lookup(User)
Expected Delivery Date	Expected_Delivery_Date__c	Date
Last Modified By	LastModifiedById	Lookup(User)
Order Count	Order_Count__c	Roll-Up Summary (COUNT Order Item)
Order Date	Order_Date__c	Date
Owner	OwnerId	Lookup(User,Group)
Purchase Order ID	Name	Text(80)
Supplier ID	Supplier_ID__c	Lookup(Supplier)
Total Order Cost	Total_Order_Cost__c	Currency(16, 2)

- Created a Text Field, Lookup Relationship, Master-detail, Number Field, Formula Field in Order Item Object.

The screenshot shows the Salesforce Object Manager interface for the 'Order Item' object. The left sidebar includes options like Setup, Home, and Object Manager. The main area displays the 'Fields & Relationships' section, which lists 9 items sorted by field label. The fields are:

Amount	Amount_del__c	Number(18, 0)
Created By	CreatedBy	Lookup(User)
Last Modified By	LastModifiedById	Lookup(User)
Order Item ID	Name	Text(80)
Product ID	Product_ID__c	Lookup(Product)
Purchase Order ID	Purchase_Order_ID__c	Master-Detail(Purchase Order)
Quantity Ordered	Quantity__c	Number(18, 0)
Quantity Received	Quantity_Received__c	Number(18, 0)
Unit Price	Unit_Price_del__c	Number(15, 2)

- Created a Text Field, Lookup Relationship, Date Field, Picklist Field, Formula Field in Inventory Transaction Object.

Fields & Relationships					
	FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Page Layouts	Created By	CreatedById	Lookup(User)		
Lightning Record Pages	Last Modified By	LastModifiedById	Lookup(User)		
Buttons, Links, and Actions	Owner	OwnerId	Lookup(User,Group)		▼
Compact Layouts	Purchase Order ID	Purchase_Order_ID__c	Lookup(Purchase Order)		▼
Field Sets	Total Order Cost	Total_Order_Cost__c	Formula (Currency)		▼
Object Limits	Transaction Date	Transaction_Date__c	Date		▼
Record Types	Transaction ID	Name	Text(80)		▼
Related Lookup Filters	Transaction Type	Transaction_Type__c	Picklist		▼
Search Layouts					
List View Button Layout					
Restriction Rules					

➤ Created a Text field, Phone Field, Email Field, TextArea Field in Supplier Object.

Fields & Relationships					
	FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Page Layouts	Address	Address__c	Text Area(255)		▼
Lightning Record Pages	Contact Person	Contact_Person__c	Text(15)		▼
Buttons, Links, and Actions	Created By	CreatedById	Lookup(User)		
Compact Layouts	Email	Email__c	Email		▼
Field Sets	Last Modified By	LastModifiedById	Lookup(User)		▼
Object Limits	Owner	OwnerId	Lookup(User,Group)		▼
Record Types	Phone Number	Phone_Number__c	Phone		▼
Related Lookup Filters	Supplier ID	Name	Text(80)		▼
Search Layouts	Supplier Name	Supplier_Name__c	Text(15)		▼
List View Button Layout					
Restriction Rules					

➤ Edit a Page Layout: Product Object, Purchase Order Object, Order Item Object, Inventory Transaction Object, Supplier Object

The screenshot shows the Salesforce Object Manager interface for the 'Product' object. The left sidebar has 'Page Layouts' selected. The main area displays the 'Product Detail' page layout with fields like Expiry Date, Last Modified By, and Unit Price. A preview window shows sample data for a product record.

The screenshot shows the 'Page Layouts' list view for the 'Product' object. It lists one item: 'Product Layout'. The details show it was created by 'kartik G' on 9/7/2025 at 4:37 AM and modified by 'kartik G' on 9/7/2025 at 11:11 AM.

➤ Purchase Order Object

The screenshot shows the Salesforce Object Manager interface for the 'Purchase Order' object. The left sidebar has 'Page Layouts' selected. The main area displays the 'Purchase Order Detail' page layout with fields like Expected Delivery Date, Actual Delivery Date, and Total Order Cost. A preview window shows sample data for a purchase order record.

Setup Home Object Manager

SETUP > OBJECT MANAGER
Purchase Order

Page Layouts

1 Items; Sorted by Page Layout Name

PAGE LAYOUT NAME	CREATED BY	MODIFIED BY
Purchase Order Layout	kartik G, 9/7/2025, 4:48 AM	kartik G, 9/7/2025, 11:10 AM

Quick Find New Page Layout Assignment

Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout

➤ Order Item Object

Setup Home Object Manager

SETUP > OBJECT MANAGER
Order Item

Fields

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

Field Name	Last Modified By	Quantity Ordered
Section		
Blank Space	Order item ID	Quantity Received
Amount	Product ID	Unit Price
Created By	Purchase Order ID	

Order Item Detail

Standard Buttons Edit Delete Clone Change Owner Change Record Type Printable View Edit Labels

Information (Header visible on edit only)
Order item ID Sample Text Purchase Order ID Sample Text
Amount 15,262

Product Details
Product ID Sample Text Quantity Ordered 26,652
Unit Price 856.42 Quantity Received 4,908

System Information (Header visible on edit only)
Created By Sample Text Last Modified By Sample Text

Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts

Setup Home Object Manager

SETUP > OBJECT MANAGER
Order Item

Page Layouts

1 Items; Sorted by Page Layout Name

PAGE LAYOUT NAME	CREATED BY	MODIFIED BY
Order Item Layout	kartik G, 9/7/2025, 4:49 AM	kartik G, 9/7/2025, 11:09 AM

Quick Find New Page Layout Assignment

Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout

➤ Inventory Transaction Object

The screenshot shows the Salesforce Object Manager interface for the 'Inventory Transaction' object. The left sidebar lists various configuration tabs: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts. The 'Page Layouts' tab is currently selected. The main area displays the 'Inventory Transaction Detail' page layout. At the top, there's a toolbar with Save, Quick Save, Preview As..., Cancel, Undo, Redo, and Layout Properties buttons. Below the toolbar is a 'Fields' section containing a table with columns for Field Name, Type, and Description. The table includes fields like Purchase Order ID, Transaction ID, Created By, Transaction Type, Total Order Cost, and Transaction Date. Standard buttons for Edit, Delete, Clone, Change Owner, Change Record Type, Printable View, Sharing, Sharing Hierarchy, and Edit Labels are located below the fields. Below these buttons are two sections: 'Information' and 'System Information'. The 'Information' section contains fields for Transaction ID, Purchase Order ID, Transaction Type, Transaction Date, and Total Order Cost, all set to 'Sample Text'. The 'System Information' section shows 'Created By' as 'kartik G' and 'Last Modified By' as 'kartik G'. A search bar at the top right of the main area allows for quick find.

➤ Supplier Object

The screenshot shows the Salesforce Object Manager interface for the 'Supplier' object. The left sidebar lists various configuration tabs: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts. The 'Page Layouts' tab is currently selected. The main area displays the 'Supplier Detail' page layout. At the top, there's a toolbar with Save, Quick Save, Preview As..., Cancel, Undo, Redo, and Layout Properties buttons. Below the toolbar is a 'Fields' section containing a table with columns for Field Name, Type, and Description. The table includes fields like Created By, Phone Number, Supplier ID, Email, Last Modified By, Address, Contact Person, and Owner. Standard buttons for Edit, Delete, Clone, Change Owner, Change Record Type, Printable View, Sharing, Sharing Hierarchy, and Edit Labels are located below the fields. Below these buttons are two sections: 'Information' and 'System Information'. The 'Information' section contains fields for Supplier ID, Supplier Name, and Contact Person, all set to 'Sample Text'. The 'System Information' section shows 'Created By' as 'kartik G' and 'Last Modified By' as 'kartik G'. A search bar at the top right of the main area allows for quick find.

The screenshot shows the Salesforce Object Manager interface for the 'Supplier' object. The left sidebar lists various setup options like Details, Fields & Relationships, Page Layouts, Lightning Record Pages, etc. The 'Page Layouts' section is currently selected. The main area displays a table titled 'Page Layouts' with one item: 'Supplier objects Layout'. The table includes columns for 'PAGE LAYOUT NAME', 'CREATED BY', and 'MODIFIED BY'. The layout was created by 'kartik G' on 9/7/2025 at 4:50 AM and modified by 'kartik G' on 9/7/2025 at 11:19 AM.

➤ Creating a Compact Layout: Product Object, Purchase Order Object

The first screenshot shows the 'Product Compact Layout' configuration page. It includes fields for 'Label' (Product Compact Layout) and 'Name' (Product_Compact_Layout). The 'Select Compact Layout Fields' section allows users to choose fields from a list of available fields (Created By, Expiry Date, Last Modified By, Minimum Stock Level, Owner, Product ID) and move them to a 'Selected Fields' list (Product Name, Unit Price, Current Stock Level). The second screenshot shows the 'Compact Layout Assignment' page for the Product object, where the 'Primary Compact Layout' is set to 'Product Compact Layout'.

SETUP > OBJECT MANAGER
Product

Compact Layouts
2 items. Sorted by Label

LABEL	API NAME	PRIMARY	MODIFIED BY	LAST MODIFIED
Product Compact Layout	Product_Compact_Layout	✓	kartik G	9/7/2025, 10:17 PM
System Default	SYSTEM			

Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout

➤ Purchase Order Object

SETUP > OBJECT MANAGER
Purchase Order

Compact Layouts
2 items. Sorted by Label

LABEL	API NAME	PRIMARY	MODIFIED BY	LAST MODIFIED
Purchase Order Compact Layout	Purchase_Order_Compact_Layout	✓	kartik G	9/7/2025, 10:25 PM
System Default	SYSTEM			

Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters

SETUP > OBJECT MANAGER
Purchase Order

Purchase Order Compact Layouts
Compact Layout Assignment

Help for this Page ⓘ

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: Purchase Order Compact Layout

Save Cancel

Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters

SETUP > OBJECT MANAGER
Purchase Order

based on the device's screen, which record page is being viewed, and the permissions of the user.

Compact Layout Edit

Enter Compact Layout Information ⓘ Required Information

Label: Purchase Order Compact L
Name: Purchase_Order_Compact_1

Select Compact Layout Fields

Available Fields: Actual Delivery Date, Created By, Expected Delivery Date, Last Modified By, Order Count, Owner
Selected Fields: Purchase Order ID, Order Date, Total Order Cost, Supplier ID
Buttons: Top, Up, Down, Bottom, Add, Remove

Use SHIFT + click to select adjacent fields. Use CTRL + click to select an assortment of fields.

Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts

➤ Creating an Expected Delivery Date Validation rule to a Employee Object

Validation Rule Edit

Rule Name: **Expected_Delivery_Date_Validation**

Active:

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

(Expected_Delivery_Date__c - Order_Date__c) > 7

Insert Selected Function
ABS(number)
Returns the absolute value of a number, a number without its sign

Help on this function

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.

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

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

Validation Rules

1 Items, Sorted by Rule Name

RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY
Expected_Delivery_Date_Validation	Top of Page	The Expected Delivery Date should not exceed 7 days.	✓	kartik G, 9/7/2025, 10:32 PM

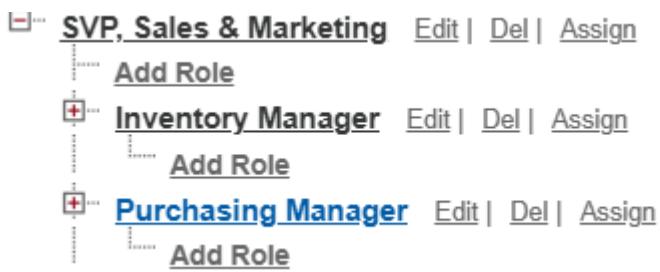
➤ Created a Profile: Inventory Manager Profile, Purchase Manager Profile

The screenshot shows the Salesforce Setup Profiles page. At the top, there's a header with a user icon and the word "Profiles". Below the header is a navigation bar with "All Profiles" and links for "Edit | Delete | Create New View". A search bar labeled "New Profile" is followed by a "User License" dropdown set to "Custom". To the right of the search bar are links for "Help for this Page" and "Help". Below the search bar is a table with columns for "Action", "Profile Name", "User License", and "Custom". The table contains three rows: "Edit | Clone Identity_User Identity", "Edit | Clone Inventory_Manager Salesforce", and "Edit | Del ... Inventory_Manager Salesforce". The "Inventory_Manager" row has a checked checkbox in the "Action" column.

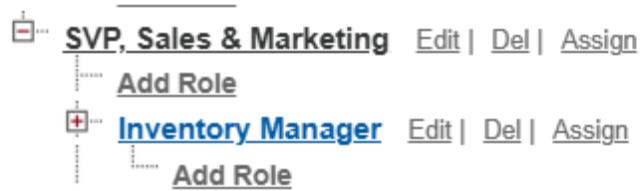
➤ Purchase Manager Profile

The screenshot shows the Salesforce Setup Profiles page. At the top, there's a header with a user icon and the word "Profiles". Below the header is a navigation bar with "All Profiles" and links for "Edit | Delete | Create New View". A search bar labeled "New Profile" is followed by a "User License" dropdown set to "Custom". To the right of the search bar are links for "Help for this Page" and "Help". Below the search bar is a table with columns for "Action", "Profile Name", "User License", and "Custom". The table contains four rows: "Edit | Clone Partner_App_Subscription_User Partner App Subscription", "Edit | Clone Partner_Community_Login_User Partner Community Login", "Edit | Clone Partner_Community_User Partner Community", and "Edit | Del ... Purchase_Manager Salesforce". The "Purchase_Manager" row has a checked checkbox in the "Action" column.

➤ Created a Role: Purchasing Manager, Inventory Manager.



➤ Inventory Manager



➤ Creating a Permission Set.

The 'Edit Properties' dialog is open, showing the configuration for a new permission set:

- Label:** Purchase Manager Create /
- API Name:** Purchase_Manager
- Description:** (empty field)
- Session Activation:** Required (checkbox checked)

At the bottom are 'Save' and 'Cancel' buttons.

The 'All Users' list view is displayed, showing the following users:

Full Name	Username	Role	Active	Profile
Chatter Expert	chatty.00dgk00000acwcpua3.mbm9y26ekzh@cha...	Chatter Free User	✓	
Integration User	integ	Analytics Cloud Integration	✓	
kartik G	kar	System Administrator	✓	
OrgFarm EPIC	OEPIC	System Administrator	✓	
Security User	sec	Analytics Cloud Security Us	✓	

Select an Expiration Option For Assigned Users

No expiration date (i)

Specify the expiration date

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

(i) Time Zone

Select a time zone...

Selected Users

Full Name	Role	Profile	Active	User License	Expires On
kartik G	System Administrator		✓	Salesforce	Never Expires

[Cancel](#)

[Back](#)

[Assign](#)

SETUP Permission Sets

Permission Sets

On this page you can create, view, and manage permission sets.

[All Permission Sets](#) [Edit](#) | [Delete](#) | [Create New View](#)

[Help for this Page](#) (i)

Action	Permission Set Name	Description	License
<input type="checkbox"/>	Clone	Partner Connect Partner Admin Setup	Salesforce
<input type="checkbox"/>	Clone	Payments Administrator	Salesforce Payments Internal
<input type="checkbox"/>	Clone	Prompt Template Manager	Einstein Prompt Templates
<input type="checkbox"/>	Clone	Prompt Template User	Einstein Prompt Templates
<input type="checkbox"/>	Clone	PromptTemplatePermSet	Cloud Integration User
<input type="checkbox"/>	Clone	Publish Suggested for You Nudges Integration User	Cloud Integration User
<input type="checkbox"/>	Del Clone	Purchase Manager Create Access	



Creating Flow to update the Actual Delivery Date.

SETUP Flows

[Flow Trigger Explorer](#)

[New Flow](#)

Flow Definitions

All Flows ▼



50+ items • Sorted by Flow Label • Filtered by All flow definitions • Updated a few seconds ago

[Filter](#) [New Flow](#)

Flow Label	Process Type	A...	Te...	Package State	Pa...	La...	La...
Add or Modify Service Appointment Attendees	Salesforce Scheduler Flow	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Managed-Installed			
Approvals Workflow: Evaluate Approval Requests	Screen Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Approvals Workflow: Process Approval Submission	Screen Flow	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Managed-Installed			
Authentication Provider User Registration	Identity User Registration Fl...	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Basic Approval Request	Flow Orchestration for CMS	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Book Appointment from Invitation	Salesforce Scheduler Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Cancel Item Flow	Screen Flow	<input type="checkbox"/>	<input type="checkbox"/>	Managed-Installed			

The screenshot shows the Flow Builder interface with the following details:

- Record-Triggered Flow Start**
- Object: Purchase Order** (with an [Edit](#) link)
- Trigger: A record is created or updated**
- Optimize for: Fast Field Updates**
- [Open Flow Trigger Explorer for Purcha...](#)
- Add Element** button
- Get Records** element selected.
- Configure Start** section:
 - Flow Name:
 - Optimize Flow** section:
 - Optimize the Flow for:** Fast Field Updates
 - Description: 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** section:
 - Description: Update any record and perform actions, like send an email. This more flexible flow runs **after the record is saved** to the database.
- Is this flow making an external callout or connecting to an external system?** (Question)
- An asynchronous path is required for flows that involve external systems.** (Text)
- Add Asynchronous Path** toggle switch (disabled)

The screenshot shows the Salesforce Flow Builder interface. At the top, there are buttons for 'Select Elements', 'Auto-Layout', and a dropdown menu. To the right are buttons for 'Run', 'Debug', 'View Tests', 'Save As New Version', 'Save', and 'Activate'.

Record-Triggered Flow
Start

Object: Purchase Order [Edit](#)

Trigger: A record is created or updated

Optimize for: Fast Field Updates

[Open Flow Trigger Explorer for Purcha...](#)

Get Purchase Record [Get Records](#) [⋮](#)

End

Get Records

How Many Records to Store

Only the first record

All records, up to a specified limit

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

Field
 [⋮](#)

[+ Add Field](#)

The screenshot shows the Salesforce Flow Builder interface. The left sidebar is titled "Manager" and includes a search bar, a "New Resource" button, and a list of resources: "Record (Single) Variables (1)" and "Get Purchase Record". The main workspace shows a "Get Records" component. The configuration pane for "Get Records" has the following settings:

- How Many Records to Store:**
 - Only the first record
 - All records, up to a specified limit
 - 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

Buttons at the bottom include a minus sign, a delete icon, and a plus sign.

New Resource

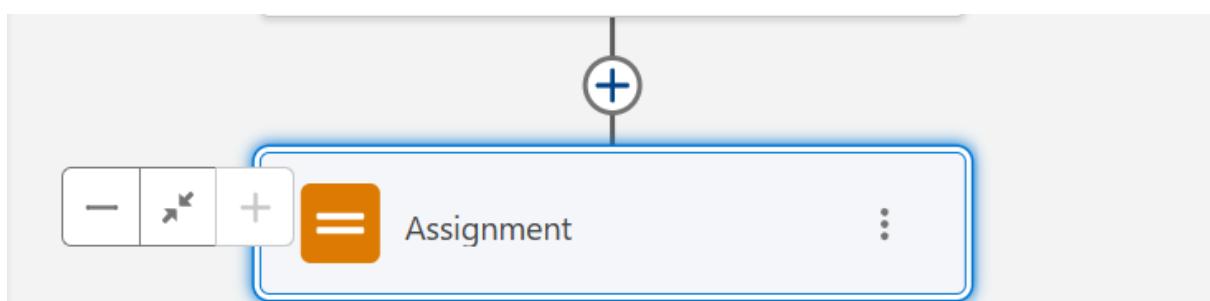
* Resource Type
Variable

* API Name ⓘ
ActualDeliveryDate

Description

* Data Type
Date Allow multiple values (collection) ⓘ

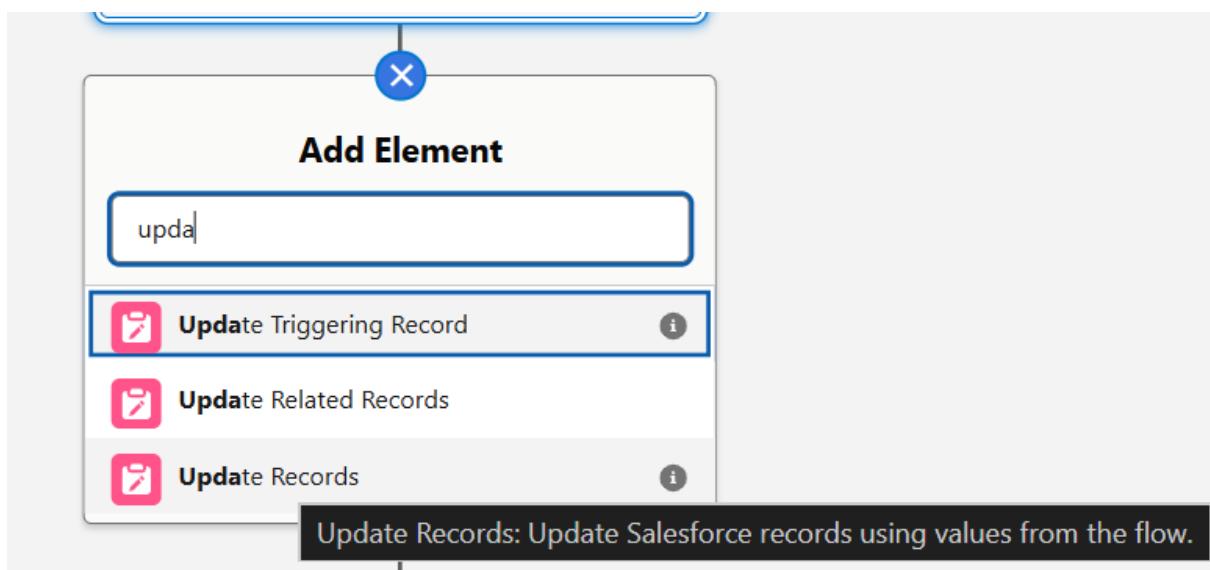
Cancel Done Done



Variable Operator Value

ActualDeliveryDate Add 3

+ Add Assignment



Update Records

* Label: Updating Purchasing Order * API Name: Updating_Purchasing_Order

Description:

* How to Find Records to Update and Set Their Values

- Use the purchase order record that triggered the flow
- Update records related to the purchase order record that triggered the flow
- Use the IDs and all field values from a record or record collection
- Specify conditions to identify records, and set fields individually

Info Because this flow runs *before* a record is saved, you can only update the record that triggered the flow to run. To update other records, configure the trigger to run the flow *after* the record is saved.

Set Filter Conditions

Condition Requirements to Update Record: None—Always Update Record

Set Field Values for the Purchase Order Record

Field	Value
Actual Delivery Date	ActualDeliveryDate

Save the flow

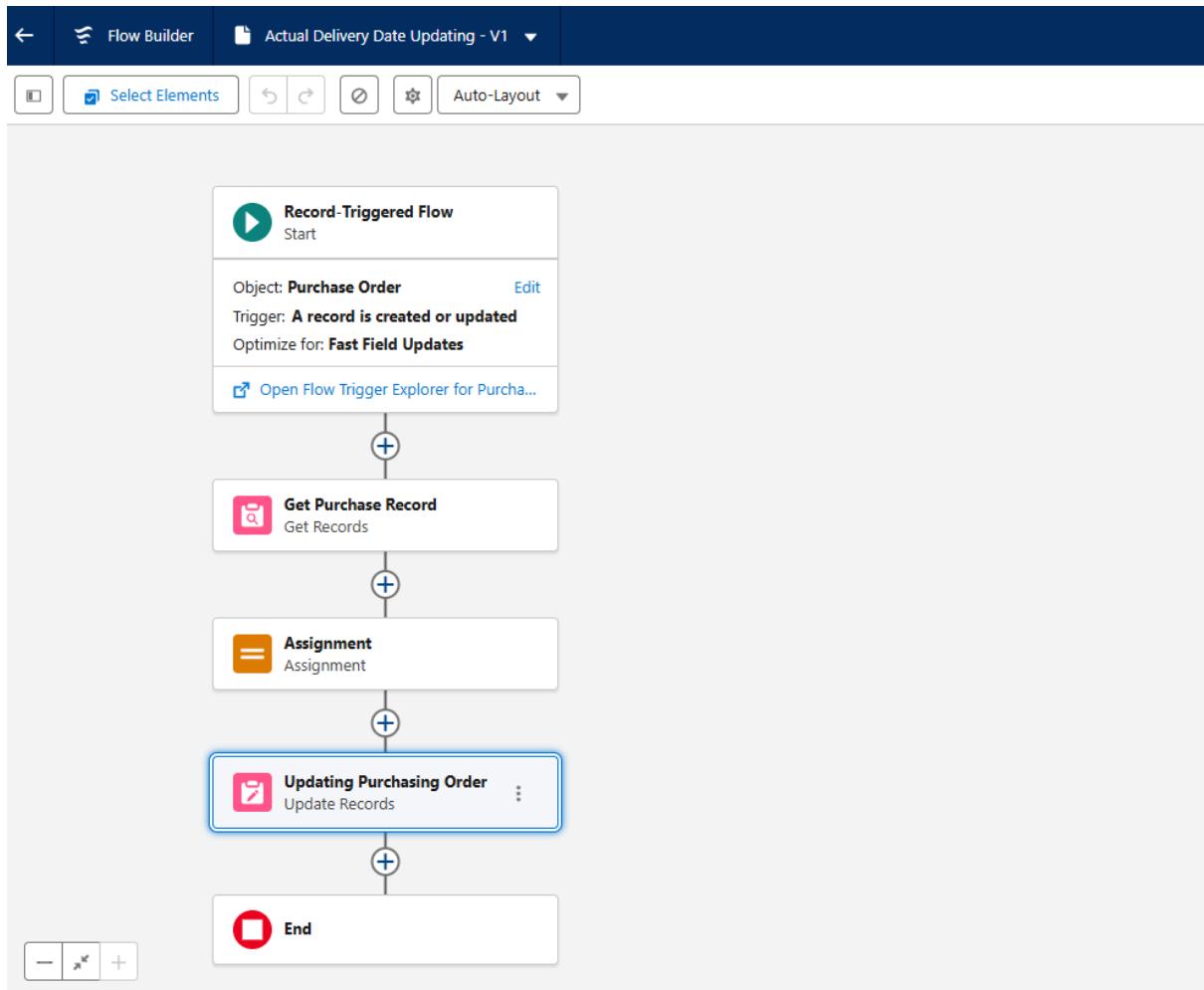
* Flow Label: Actual Delivery Date Updating * Flow API Name: Actual_Delivery_Date Updating

Description:

Show Advanced

Info Because this flow runs *before* a record is saved, you can only update the record that triggered the flow to run. To update other records, configure the trigger to run the flow *after* the record is saved.

Cancel Save



➤ Create a Trigger to Calculate total amount on Order Item.

```
File ▾ Edit ▾ Debug ▾ Test ▾ Workspace ▾ Help ▾ < >
CalculateTotalAmountTrigger.apxt * CalculateTotalAmountHandler.apxc *
Code Coverage: None ▾ API Version: 64 ▾ Go To
1 trigger CalculateTotalAmountTrigger on Order_Item__c (after insert, after update, after delete, after undelete) {
2
3     // Call the handler class to handle the logic
4
5     CalculateTotalAmountHandler.calculateTotal(Trigger.new, Trigger.old, Trigger.isInsert, Trigger.isUpdate, Trigger.isDelete)
6
7 }
```

```

File ▾ Edit ▾ Debug ▾ Test ▾ Workspace ▾ Help ▾ < >
CalculateTotalAmountTrigger.apxt * CalculateTotalAmountHandler.apxc *
Code Coverage: None ▾ API Version: 64 ▾ Go To
1 public class CalculateTotalAmountHandler {
2
3
4
5     // Method to calculate the total amount for Purchase Orders based on related Order Items
6
7     public static void calculateTotal(List<Order_Item__c> newItems, List<Order_Item__c> oldItems, Boolean isInsert, Boolean
8
9
10    // Collect Purchase Order TDS affected by changes in Order Item - c records
11

```

➤ Created Reports: Purchase Orders Based on Suppliers summary), Purchase Details

Report Purchase Orders with Order Items and Product ID
Complete Purchase Details Report

Total Records	Total Order Count	Total Quantity Received	Total Amount
2	2	60	150

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

Supplier ID	Actual Delivery Date	Purchase Order: Purchase Order ID	Product ID: Product ID	Order Count	Product ID: Product Name	Quantity Received	Amount
01 (2)	9/12/2025 (2)	001 (2)	01gK000005dKm	2	citrizine	50	100
			01gK000005dKnB	2	soridon	10	50
				2		60	150
				2		60	150
				2		60	150
				2		60	150
				2		60	150
				2		60	150

➤ Purchase Details

Report: Purchase Orders
Purchase Orders based on Suppliers

Total Records
2

Supplier ID	Purchase Order: Purchase Order ID	Order Count →	0	2	Total		
		Total Order Cost →	\$50.00	\$50.00	Subtotal		
01	001	Record Count	0	0	1	1	1
		Subtotal	0	0	1	1	1
02	467	Record Count	1	1	0	0	1
		Subtotal	1	1	0	0	1
		Total	1	1	1	1	2
		Record Count	1	1			

➤ Created Dashboard

New Dashboard

* Name

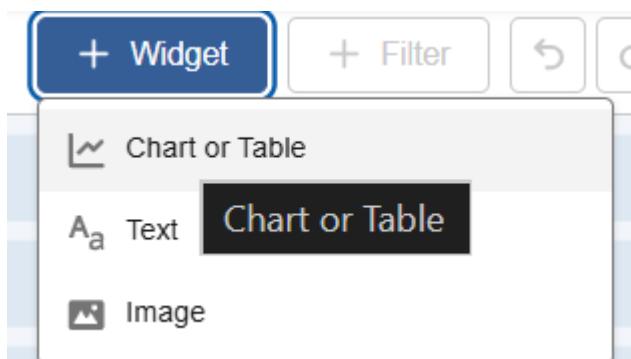
Medical Inventory DashBoard

Description

Folder

Private Dashboards Select Folder

Cancel Create



Select Report

Reports

- Recent
- Created by Me
- Private Reports** (selected)
- Public Reports
- All Reports

Folders

- Created by Me
- Shared with Me
- All Folders

Select Report

Search Reports and Folders... Reports and Folders ▾

Purchase Orders based on Suppliers
kartik G - Sep 8, 2025, 12:54 AM · Private Reports

Purchase Orders based on Suppliers
kartik G - Sep 8, 2025, 10:26 PM · Private Reports

Cancel Select

Edit Widget

Report
Purchase Orders based on Supplier

Use chart settings from report i

Display As


Value
Record Count

Sliced By
Supplier ID

Preview

Purchase Orders based on Suppliers

Record Count

Supplier ID

01

02

2

1

1

View Report (Purchase Orders based on Suppliers)

Edit Widget

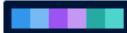
Purchase Orders based on Suppliers

Subtitle

Footer

Legend Position
Right

Widget Theme
 Light (Dashboard default)

 Dark


Preview

Purchase Orders based on Suppliers

Record Count

Supplier ID

01

02

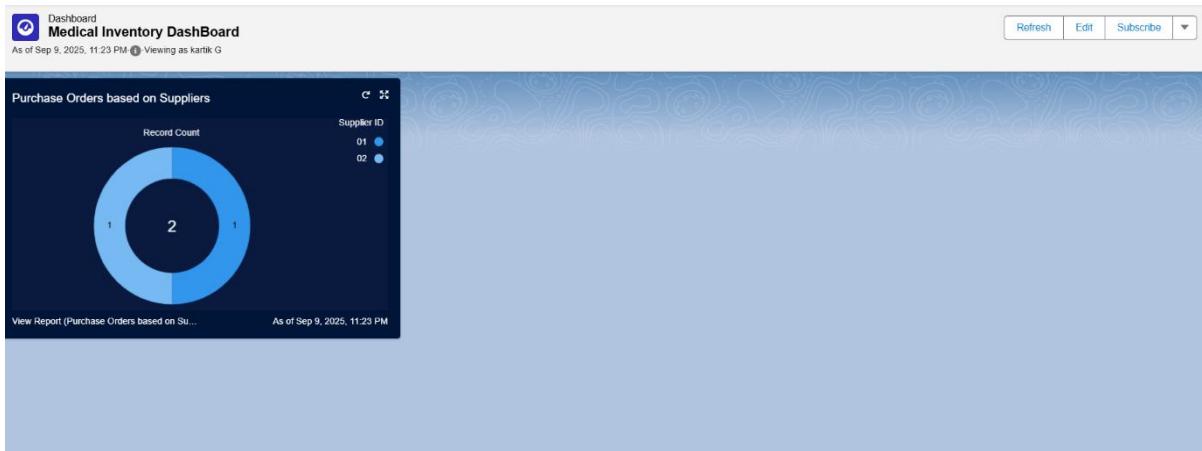
2

1

1

View Report (Purchase Orders based on Suppliers)

➤ View Dashboard



➤ Advantages and Disadvantages of Medical Inventory Management

■ Advantages

- > **Centralized Inventory Tracking** – Manage all medicines, supplies, and equipment in one place.
- > **Real-Time Stock Visibility** – Check available stock instantly across departments or branches.
- > **Automation** – Auto-reordering when stock is low, expiry alerts, and stock updates.
- > **Integration** – Connects with ERP, EHR, pharmacy, billing, and POS systems.
- > **Compliance Support** – Helps follow FDA, HIPAA, CDSCO and other medical regulations.
- > **Advanced Reporting** – Generate audit-ready reports on usage, expiry, and stock history.

- > **Better Patient Care** – Ensures required medicines and equipment are available on time.
- > **Scalability** – Works for small clinics, hospitals, and large healthcare chains.
- > **Customization** – Workflows, dashboards, and automation can be fully tailored.
- > **Improved Decision-Making** – Data-driven insights help in better procurement planning.

■ **Disadvantages**

- > **High Setup Cost** – Salesforce licensing and customization are expensive.
- > **Complex Customization** – Advanced medical inventory needs skilled Salesforce developers.
- > **Training Requirement** – Staff, nurses, and pharmacists need proper training to use it.
- > **Internet Dependency** – Being cloud-based, it requires a stable connection.
- > **Data Security Concerns** – Sensitive healthcare data needs strict security controls.
- > **Ongoing Maintenance Costs** – Continuous updates, integration fixes, and enhancements add expenses.
- > **Integration Challenges** – Linking with existing hospital systems can be complex.

- > **User Adoption Issues** – If staff don't update stock properly, data becomes inaccurate.
- > **Compliance Risk** – Misconfigured access or incorrect reporting may cause legal issues.
- > **Overkill for Small Clinics** – For small setups, Salesforce may be too heavy and costly.

➤ **Conclusion**

Medical inventory management in Salesforce provides healthcare organizations with a centralized, efficient, and automated platform to track, manage, and optimize their medical supplies. By integrating real-time inventory tracking, automated stock updates, and detailed reporting, Salesforce helps reduce manual errors, avoid stockouts or overstocking, and ensure timely availability of essential medical items.

However, successful implementation requires proper configuration, user training, and data accuracy. When used effectively, Salesforce empowers hospitals, clinics, and healthcare providers to streamline operations, improve patient care, and reduce operational costs, making it a powerful solution for modern medical inventory management.

➤ **APPENDIX**

Source Code: Provided in Apex Triggers and Apex Classes

● **CalculateTotalAmountTrigger**

```
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);
}
```

● **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__);
            }
        }
    }
}
```

```

}

// 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;
        }
    }
}
```