



P.S.R. RENGASAMY COLLEGE OF ENGINEERING

(Approved by AICTE, New Delhi & Affiliated to Anna University, Chennai)



Project name Medical Inventory Management

submitted by

Group members name:

M.Mehala

M.Kavitha

A.Suvithra

B.Mathavi

Medical Inventory Management

User Story:

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

Project Overview :

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

Project Flow:

- Milestone 1 : Creation of developer account
- Milestone 2 : Object Creation
- Milestone 3 : Tabs
- Milestone 4 : The Lightning App
- Milestone 5 : Fields
- Milestone 6 : Updating of Page Layouts
- Milestone 7 : Compact Layouts
- Milestone 8 : Validation rules
- Milestone 9 : Profiles
- Milestone 10 : Roles
- Milestone 11 : Users
- Milestone 12 : Permission Sets
- Milestone 13 : Flows
- Milestone 14 : Triggers
- Milestone 15 : Reports

Milestone 16 : Dashboards

Milestone 17 : Conclusion

What you'll learn:

1. Real Time Salesforce Project
2. Object C their relationship in Salesforce
3. Page Layout
4. Validation Rules
5. Compact Layouts
6. Profiles
7. Roles
8. Users
9. Permission Sets
10. Triggers
11. Flows
12. Reports
13. Dashboards

Milestone 1-Salesforce Account

Introduction:

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

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

What Is Salesforce?

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

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

<https://youtu.be/r9EX3lGde5k>

Activity 1: Creating Developer Account

Creating a developer org in salesforce.

Go to <https://developer.salesforce.com/signup>

On the sign up form, enter the following details :

First name Last name

Email

Role : Developer

Company : College Name

County : India

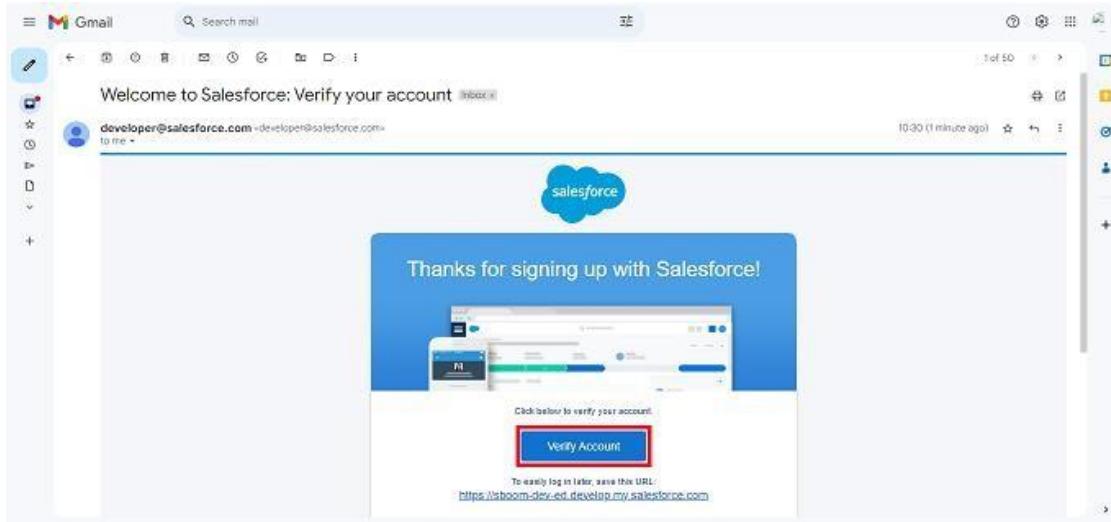
Postal Code : pin code

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

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.

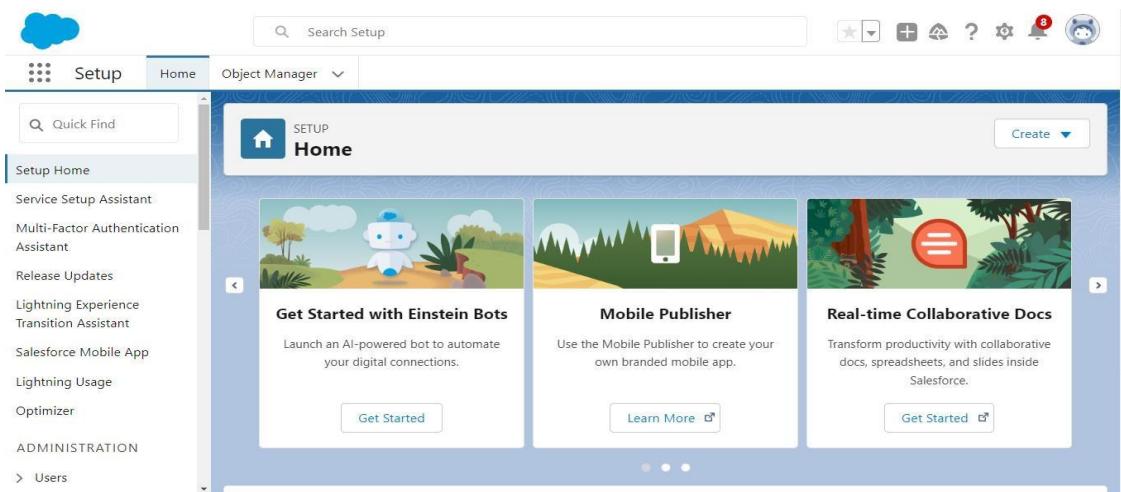


Click on Verify Account

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 says "Enter a new password for lead@sboom.com. Make sure to include at least: 8 characters, 1 letter, 1 number". There are fields for "New Password" and "Confirm New Password", both of which are highlighted with a red box. Below that is a "Security Question" field with the question "In what city were you born?" and an "Answer" field containing "asdfghjkl", also highlighted with a red box. At the bottom is a "Change Password" button.

Then you will redirect to your salesforce setup page.



Milestone 2- Objects

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

Activity 1: Creating a Product Object

To create an object:

From the setup page

Click on Object Manager

Click on Create >> Click on Custom Object.

Enter the label name as Product

Enter Plural label name as Products

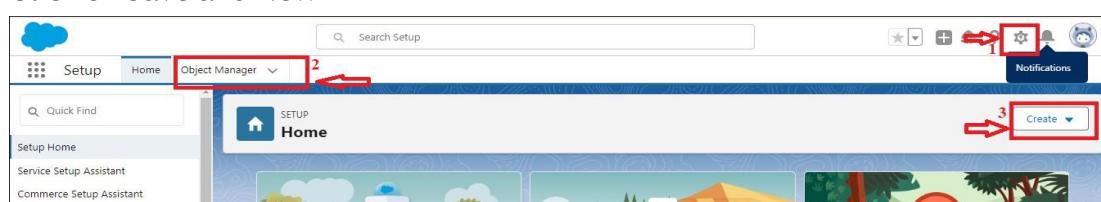
Enter Record Name as Product ID

Select Data Type as Text.

Select Allow reports.

Select Allow search.

Click on Save and New



Setup | Home | Object Manager

SETUP New Custom Object

Custom Object Definition Edit

Custom Object Information

The singular and plural labels are used in page layouts, and reports.

4 Label: Product Example: Account
 5 Plural Label: Products Example: Accounts
 Starts with vowel sound

The Object Name is used when referencing the object via the API.

Object Name: Product Example: Account

Description:

Context-Sensitive Help Setting: Open the standard Salesforce.com Help & Training window
 Open a window using a Visualforce page

Enter Record Name Label and Format

The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.

6 Record Name: Product ID Example: Account Name
 7 Data Type: Text Warning: If you plan to insert a high volume of records in this object, via the API for example, use the Text data type.

Optional Features

Allow Reports 8
 Allow Activities
 Track Field History
 Allow in Chatter Groups
 Enable Licensing

Deployment Status

In Development
 Deployed

Search Status

When this setting is enabled, your users can find records of this object type when they search. Learn more.
 9 Allow Search

Object Creation Options (Available only when custom object is first created)

Add Notes and Attachments related list to default page layout
 Launch New Custom Tab Wizard after saving this custom object

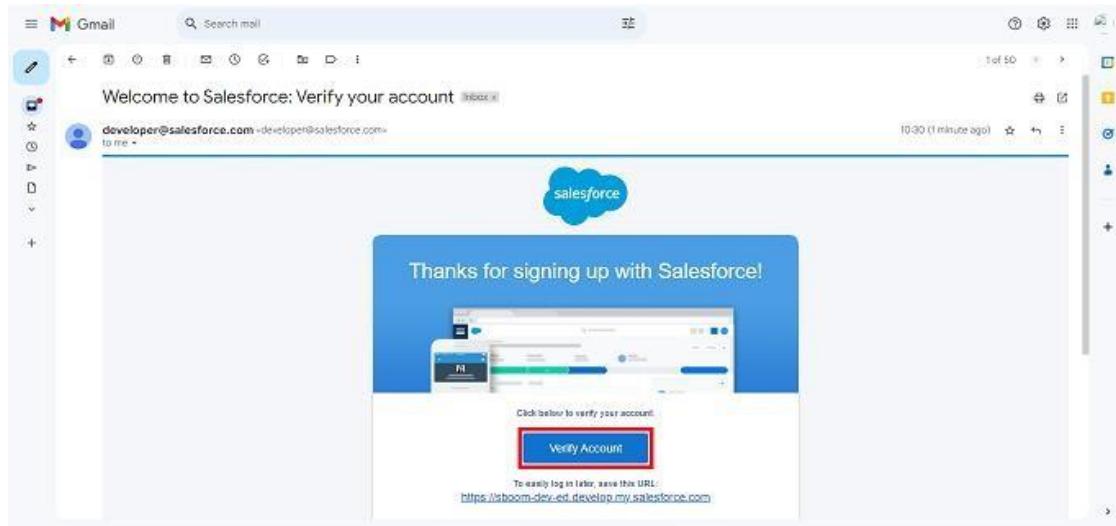
10 Save Save & New Cancel

Activate Windows
 Go to Settings to activate Windows.

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

Activity 2: Account Activation

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.

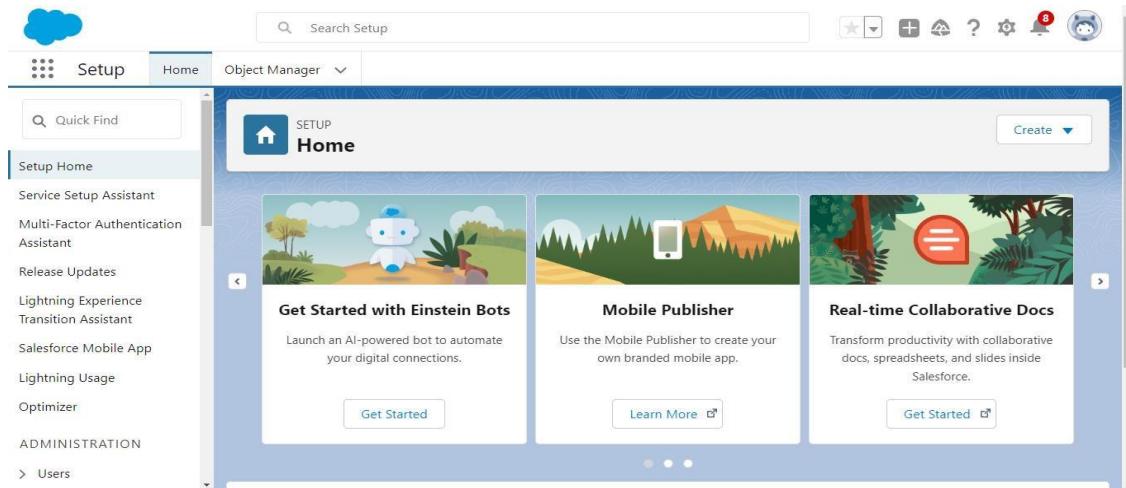


Click on Verify Account

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

A screenshot of a "Change Your Password" page. The title is "Change Your Password". It says "Enter a new password for lead@sboom.com. Make sure to include at least:" followed by three requirements: "8 characters", "1 letter", and "1 number". Below these are two password input fields: "New Password" and "Confirm New Password", both with red borders. Underneath is a "Security Question" section with a dropdown menu showing "In what city were you born?". Below that is an "Answer" input field containing "asdfghijkl" and a red border. At the bottom is a blue "Change Password" button.

Then you will redirect to your salesforce setup page.



Milestone 3- Tabs

In Salesforce, tabs are used to make the data stored in objects accessible to users through the user interface. Tabs are a fundamental part of the Salesforce interface, providing a way to navigate to different objects and records.

Activity 1: Creating a tab for Product Object

Go to the setup page >> type Tabs in Quick Find bar

Click on tabs

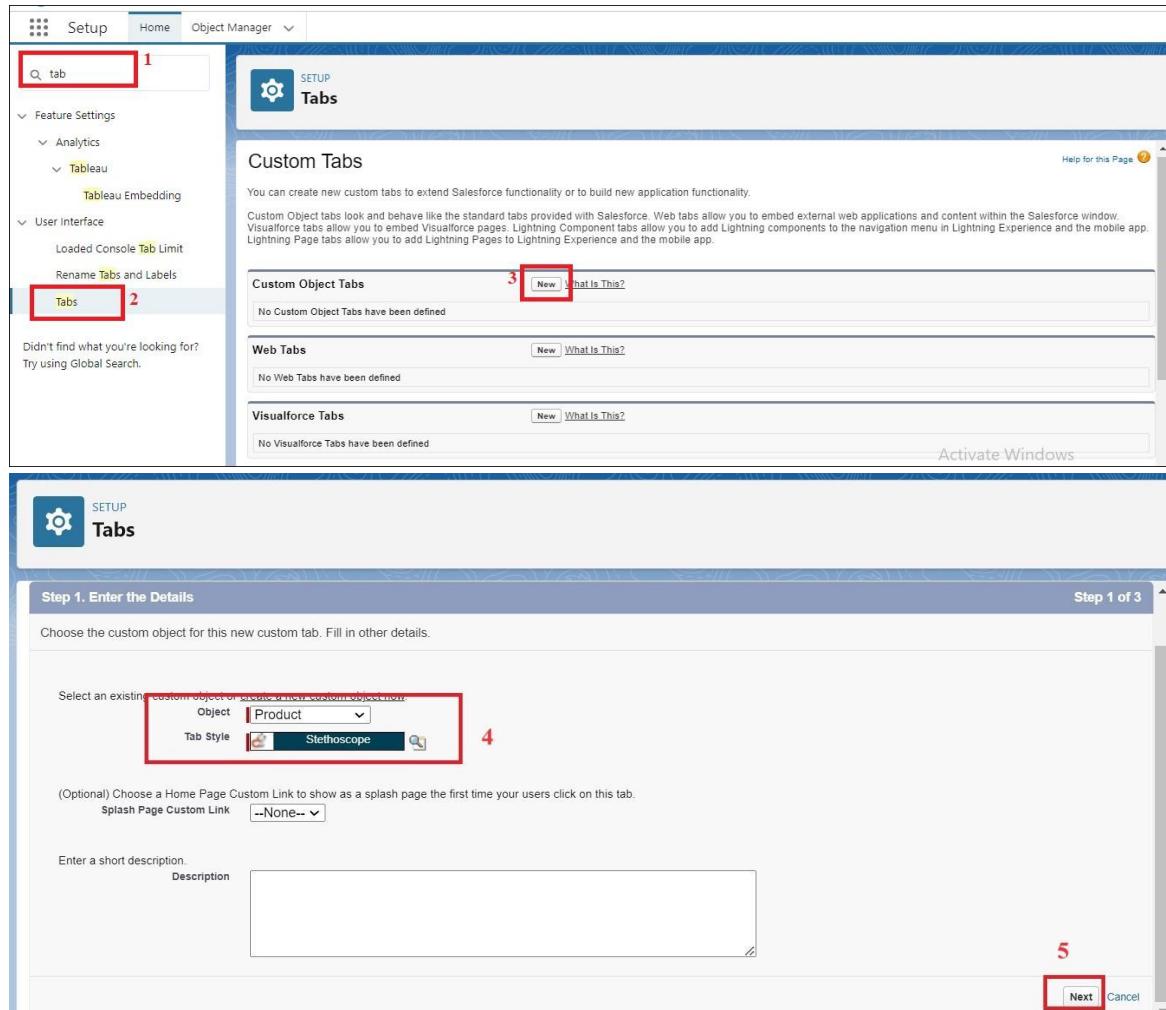
Click on New (under custom object tab).

Select Object(Product) >> Select the tab style

Click on Next >> (Add to profiles page) keep it as default >> Click on Next (Add to Custom App) uncheck the include tab .

Make sure that the Append tab to user's existing personal customizations is checked.

Click save



Activity 2: Creating Remaining Tabs

Now create the Tabs for the remaining Objects, they are “Purchase Order, Order Item, Inventory Transaction, Supplier”.

Follow the same steps as mentioned in Activity -1 .

Milestone 4- The Lightning App

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

Activity 1: Create a Lightning App for Medical Inventory Management

From Setup, enter App Manager in the Quick Find and select App Manager.

Click New Lightning App.

Enter Medical Inventory Management as the App Name >> Click on upload image and add an image related to Medical Inventory then click next

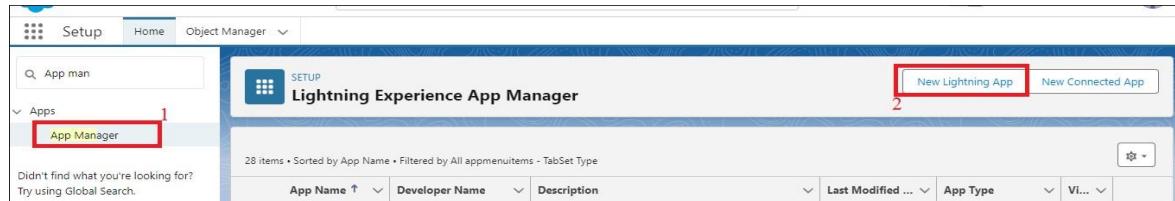
Under App Options, leave the default selections and click next.

Under Utility Items, leave as is and click Next.

From Available Items, select Products, Purchase Orders, Order Items, Inventory Transactions, Suppliers, Reports, and Dashboards and move them to Selected Item and Click Next.

From Available Profiles, select System Administrator and move it to Selected Profiles.

Click Save C Finish.

A screenshot of the 'New Lightning App' configuration screen. The left side shows the 'App Details' section with fields for 'App Name' (Medical Inventory Management), 'Developer Name' (Medical_Inventory_Management), and 'Description' (Enter a description...). The right side shows the 'App Branding' section with an 'Image' field containing a medical inventory icon (highlighted with a red box), a 'Primary Color Hex Value' field (#0070D2), and an 'Org Theme Options' checkbox. At the bottom right is a 'Next' button (highlighted with a red box).

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

- Products
- Purchase Orders
- Order Items
- Inventory Transactions
- Suppliers
- Reports

6

New Lightning App

User Profiles

Choose the user profiles that can access this app.

7

Available Profiles

Selected Profiles

8

Save & Finish

Milestone 5- Fields

Object	Field Name	Data Type
Product	Product ID(Standard)	Text
	Product Name	Text
	Product Description	Text Area
	Minimum Stock Level	Number(18, 0)
	Current Stock Level	Number(18, 0)
	Unit Price	Currency(16, 2)

	Expiry Date	Date
Purchase Order	Purchase Order ID(Standard)	Text
	Supplier ID	Lookup(Supplier)
	Order Date	Date
	Expected Delivery Date	Date
	Actual Delivery Date	Date
	Order Count	Roll-Up Summary (COUNT Order Item)
	Total Order Cost	Currency(16, 2)
Order Item	Order Item ID(Standard)	Text
	Product ID	Lookup(Product)
	Purchase Order ID	Master-Detail(Purchase Order)
	Quantity Ordered	Number(18, 0)
	Quantity Received	Number(18, 0)
	Unit Price	Formula(Currency)
	Amount	Formula(Currency)
Inventory Transaction	Transaction ID(Standard)	Text
	Purchase Order ID	Lookup(Purchase Order)
	Transaction Date	Date
	Transaction Type	Picklist
	Total Order Cost	Formula(Currency)

Supplier	Supplier ID(Standard)	Text
	Supplier Name	Text
	Contact Person	Text
	Phone Number	Phone
	Email	Email
	Address	TextArea

Activity 1: Creating a Text Field in Product Object

To create fields in an object:

Click the gear icon and select Setup. This launches Setup in a new tab.

Click the Object Manager tab next to Home.

Select Product custom object.

Select Fields C Relationships from the left navigation

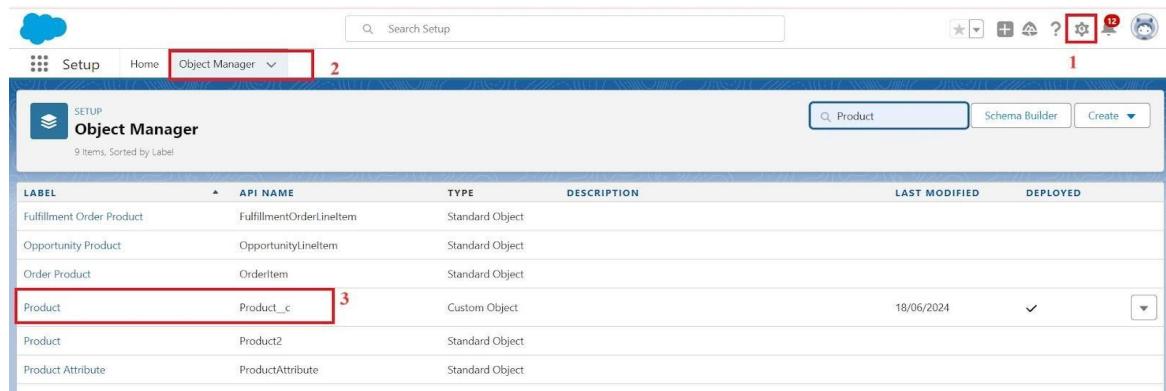
Click on New

Select Text field, click Next

Enter Field Label as “Product Name” and Length 255.

Select Required Field.

Click Next, Next, then Save C New.



The screenshot shows the Salesforce Object Manager interface. At the top, there are tabs for Setup, Home, and Object Manager, with Object Manager selected. A red box highlights the 'Object Manager' tab. In the top right corner, there are several icons: a magnifying glass for search, a gear for setup, a question mark for help, a refresh button, and a GitHub icon. The main area is titled 'Object Manager' and shows a list of objects: Fulfillment Order Product, Opportunity Product, Order Product, Product, Product, and Product Attribute. The 'Product' row is highlighted with a red box and has a red number '3' next to it, indicating a step in the process. The 'Product' object is listed under 'Custom Object'. The table columns are labeled: LABEL, API NAME, TYPE, DESCRIPTION, LAST MODIFIED, and DEPLOYED. The 'LAST MODIFIED' column shows the date '18/06/2024' for the Product object.

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Fulfillment Order Product	FulfillmentOrderLineItem	Standard Object			
Opportunity Product	OpportunityLineItem	Standard Object			
Order Product	OrderItem	Standard Object			
Product	Product_c	Custom Object		18/06/2024	✓
Product	Product2	Standard Object			
Product Attribute	ProductAttribute	Standard Object			

Setup > Object Manager

Product

Fields & Relationships

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User/Group)		✓
Product ID	Name	Text(80)		✓

clicking Send an Email. Note that custom email addresses cannot be used for mass emails.

- Geolocation
- Number
- Percent
- Phone
- Picklist
- Picklist (Multi-Select)
- Text**
- Text Area
- Text Area (Long)
- Text Area (Rich)
- Text (Encrypted) i
- Time
- URL

Allows users to define locations. Includes latitude and longitude components, and can be used to calculate distance.

Allows users to enter any number. Leading zeros are removed.

Allows users to enter a percentage number, for example, '10' and automatically adds the percent sign to the number.

Allows users to enter any phone number. Automatically formats it as a phone number.

Allows users to select a value from a list you define.

Allows users to select multiple values from a list you define.

Allows users to enter any combination of letters and numbers.

Allows users to enter up to 255 characters on separate lines.

Allows users to enter up to 131,072 characters on separate lines.

Allows users to enter formatted text, add images and links. Up to 131,072 characters on separate lines.

Allows users to enter any combination of letters and numbers and store them in encrypted form.

Allows users to enter a local time. For example, "2:40 PM", "14:40", "14:40:00", and "14:40:50.600" are all valid times for this field.

Allows users to enter any valid website address. When users click on the field, the URL will open in a separate browser window.

Next Cancel

Step 2. Enter the details

Step 2 of 4

Previous **Next** Cancel

Field Label **Product Name** i 7

Please enter the maximum length for a text field below.
Length **255** 7

Field Name **Product** i

Description

Help Text

Required Always require a value in this field in order to save a record
Unique Do not allow duplicate values

- Treat "ABC" and "abc" as duplicate values (case insensitive)
- Treat "ABC" and "abc" as different values (case sensitive)

External ID Set this field as the unique record identifier from an external system

Auto add to custom report type Add this field to existing custom report types that contain this entity i

Activity 2: Creating a TextArea Field in Product Object

To create fields in an object:

Click the gear icon and select Setup. This launches Setup in a new tab.

Click the Object Manager tab next to Home.

Select Product custom object.

Select Fields C Relationships from the left navigation

Click on New

Select TextArea field, click Next

Enter Field Label as “Product Description” .

Click Next, Next, then Save C New.

6

7

8

Activity 3: Creating a Number Field in Product object

To create fields in an object:

Go to setup >> click on Object Manager >> type object name(Product) in quick find box >> click on the Product custom object.

Now click on “Fields C Relationships”

Click on New.

Select Data type as “Number” and click Next.

Enter Field Label as “ Current Stock Level”.

Length - 18, Decimal Places - 0.

Click on Next, Next and Save.

This screenshot shows the 'Step 2. Enter the details' screen for creating a new field. The field label is 'Current Stock Level' (highlighted with a red box and labeled 5). The length is set to 18 (highlighted with a red box and labeled 6) and the decimal places are set to 0. The field name is 'Current_Stock_Level'. There are fields for description and help text, both of which are currently empty. At the bottom, there are several optional checkboxes: 'Required' (unchecked), 'Unique' (unchecked), and 'External ID' (unchecked). The top right corner shows 'Step 2 of 4' and 'Next' (highlighted with a red box and labeled 7) and 'Cancel' buttons.

Activity 4: Creating a Currency Field in Product object

To create fields in an object:

Go to setup >> click on Object Manager >> type object name(Product) in quick find box >> click on the Product custom object.

Now click on “Fields C Relationships”

Click on New.

Select Data type as “Currency” and click Next.

Enter Field Label as “ Unit Price”.

Length - 16, Decimal Places - 2.

Select Required Field.

Click on Next, Next and Save.

This screenshot shows the 'Step 2. Enter the details' screen for creating a new field. The field label is 'Unit Price' (highlighted with a red box and labeled 5). The length is set to 16 (highlighted with a red box and labeled 6) and the decimal places are set to 2. The field name is 'Unit_Price'. There are fields for description and help text, both of which are currently empty. At the bottom, there are several optional checkboxes: 'Required' (checked), 'Auto add to custom report type' (unchecked), and 'Add this field to existing custom report types that contain this entity' (unchecked). The top right corner shows 'Step 2 of 4' and 'Next' (highlighted with a red box and labeled 8) and 'Cancel' buttons.

Activity 5 : Creating Lookup Relationship in Purchase Order Object

Object

A Lookup relationship is a type of relationship in Salesforce that connects two objects together based on a field known as the Lookup field. It establishes a relationship between a child object and a parent object, allowing the child object to reference the parent object.

To Create a relationship from Purchase Order to Supplier .

Go to the Setup page >> click on Object manager >> type object name(Purchase Order) in the quick find bar >> click on the Purchase Order object.

Click on Fields C Relationship

Click on New.

Select “Lookup relationship” as data type and click Next.

Select the related object “Supplier”.

Click on Next.

Give Field Label as “Supplier ID” .

Select Required Field.

Click on Next , Next, Next , Save.

The screenshot shows the 'Data Type' step of a custom field creation wizard. The user has selected 'Lookup Relationship' (radio button 4). A tooltip for this selection is displayed, explaining that it creates a relationship that links the object to another object, allowing users to click on a lookup icon to select a value from a popup list. The master object is the source of the values in the list. Other options shown include 'None Selected', 'Auto Number', 'Formula', 'Roll-Up Summary', 'Master-Detail Relationship', and 'External Lookup Relationship'. The 'Next' button is highlighted with a red box.

The screenshot shows 'Step 2. Choose the related object' of the wizard. The user has selected 'Supplier' from the 'Related To' dropdown menu (button 5). The 'Next' button is highlighted with a red box. The 'Help for this Page' link is visible at the top right.

Activity 6: Creating a Date Field in Purchase Order object

To create fields in an object:

Go to setup >> click on Object Manager >> type object name(Purchase Order) in quick find box>> click on the Purchase Order object.

Now click on “Fields C Relationships”

Click on New.

Select Data type as “Date” and click Next.

Enter Field Label as “ Order Date”.

Click on Next, Next and Save.

Activity 7: Creating a Roll-Up Summary Field in Purchase Order object

To create fields in an object:

Go to setup >> click on Object Manager >> type object name(Purchase Order) in quick find box>> click on the Purchase Order object.

Now click on “Fields C Relationships”

Click on New.

Select Data type as “Roll-Up Summary” and click Next.

Enter Field Label as “ Order Count”.

Choose the Summarized Object as “Order Items”.

For Select Roll-Up Type select “Count”.

Click on Next, Next and Save.

The screenshot shows a 'Data Type' selection interface. It includes options for 'None Selected', 'Auto Number', 'Formula', and 'Roll-Up Summary'. The 'Roll-Up Summary' option is highlighted with a red box and the number '4' below it. A note indicates that this is a read-only field displaying the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.

The screenshot shows the 'Step 2. Enter the details' screen. It has fields for 'Field Label' (set to 'Order Count'), 'Field Name' (set to 'Order_Count'), 'Description', and 'Help Text'. A note at the bottom says 'Auto add to custom report type' with a checked checkbox. The 'Next' button is highlighted with a red box and the number '5' below it.

The screenshot shows the 'Step 3. Define the summary calculation' screen. It includes sections for 'Select Object to Summarize' (Master Object: Purchase Order, Summarized Object: Order Items), 'Select Roll-Up Type' (COUNT is selected), and 'Filter Criteria' (checkboxes for including all records or only records meeting criteria). A note at the top right says 'Required Information' with a red box and the number '6' below it.

Activity 8: Creating a Unit Price Formula Field in Order Item object

To create fields in an object:

Go to setup >> click on Object Manager >> type object name(Order Item) in quick find box >> click on the Order Item object.

Now click on “Fields C Relationships”

Click on New.

Select Data type as “Formula” and click Next.

Enter field label Unit Price.

Select formula return type Currency, Click Next

Create and insert Advance formula: Product_ID_r.Unit_Price_c

Click Next, Next, then Save.

Step 2 of 5

Field Label 5

Field Name i

Auto add to custom report type Add this field to existing custom report types that contain this entity i

Formula Return Type

None Selected Select one of the data types below.

Checkbox Calculate a boolean value
Example: `[TODAY] > CloseDate`

Currency **6** Calculate a dollar or other currency amount and automatically format the field as a currency amount.
Example: `Gross Margin = Amount - Cost_c`

Date Calculate a date, for example, by adding or subtracting days to other dates.
Example: `Reminder Date = CloseDate - 7`

Date/Time Calculate a date/time, for example, by adding a number of hours or days to another date/time.
Example: `[Next = NOW() + 1]`

Number Calculate a numeric value.
Example: `[Fahrenheit = 1.8 * Celsius_c + 32]`

Percent Calculate a percent and automatically add the percent sign to the number.

Help for this Page ?

Order Item
New Custom Field

Step 3 of 5

Previous Next Cancel

Enter your formula and click Check Syntax to check for errors. Click the Advanced Formula subtab to use additional fields, operators, and functions.

Example: `Gross Margin = Amount - Cost_c` [More Examples...](#)

Simple Formula Advanced Formula

Insert Field Insert Operator ▼

Unit Price (Currency) = **7**

Functions -- All Function Categories --

ABS
ACOS
ADDMONTHS
AND
ASCII
ASIN

Insert Selected Function

Activity G: Creating a Amount Formula Field in Order Item object

To create fields in an object:

Go to setup >> click on Object Manager >> type object name(Order Item) in quick find box >> click on the Order Item object.

Now click on “Fields C Relationships”

Click on New.

Select Data type as “Formula” and click Next.

Enter field label Amount.

Select formula return type Currency, Click Next

Create and insert Advance formula: Quantity_Received_c * Unit_Price_c

Click Next, Next, then Save.



Activity 10: Creating a Picklist Field in Inventory Transaction Object

To create fields in an object:

Go to setup >> click on Object Manager >> type object name(Inventory Transaction) in quick find box>> click on the Inventory Transaction Object.

Now click on “Fields C Relationships” .

Click on New.

Select Data type as “Picklist” and click Next.

Enter Field Label as “Transaction Type”.

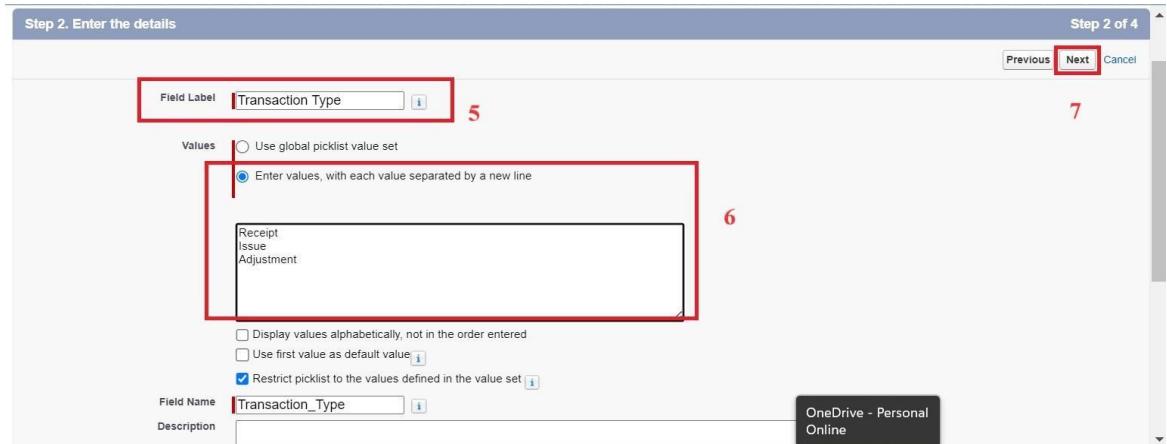
In values select “Enter values, with each value separated by a new line” and enter values as shown below.

Receipt

Issue

Adjustment

Click on Next, Next and Save.



Activity 11: Creating a Total Order Cost Formula Field in Inventory Transaction object

To create fields in an object:

Go to setup >> click on Object Manager >> type object name(Inventory Transaction) in quick find box >> click on the Order Item object.

Now click on “Fields C Relationships”

Click on New.

Select Data type as “Formula” and click Next.

Enter field label Total Order Cost.

Select formula return type Currency, Click Next

Create and insert Advance formula: Purchase_Order_ID_r.Total_Order_Cost_c

Click Next, Next, then Save.

Activity 12: Creating a Phone Field in Supplier object

To create fields in an object:

Go to setup >> click on Object Manager >> type object name(Supplier) in quick find box>> click on the Supplier object.

Now click on “Fields C Relationships”

Click on New.

Select Data type as “Phone” and click Next.

Enter the Field Label as “ Phone Number”.

Select Required Field.

Click on Next, Next and Save.

Step 2. Enter the details

Field Label: 5

Field Name: 6

Description:

Help Text:

Required: Always require a value in this field in order to save a record 6

Auto add to custom report type: Add this field to existing custom report types that contain this entity 6

Default Value: 7

Use formula syntax: Enclose text and picklist value API names in double quotes: ("the_text"), include numbers without quotes : (25), show percentages as decimals: (0.10), and express date calculations in the standard format: (Today() + 7). To reference a field from a Custom Metadata type record use: \$CustomMetadata.Type__mdt RecordAPIName:Field__c

Activity 13: Creating a Email Field in Supplier object

To create fields in an object:

Go to setup >> click on Object Manager >> type object name(Supplier) in quick find box>> click on the Supplier object.

Now click on “Fields C Relationships”

Click on New.

Select Data type as “Email” and click Next.

Enter the Field Label as “ Email”.

Click on Next, Next and Save.

Step 2. Enter the details Step 2 of 4

Field Label 5

Field Name

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

Auto add to custom report type Add this field to existing custom report types that contain this entity

Default Value

Use formula syntax. Enclose text and picklist value API names in double quotes : ("the_text"). include numbers without quotes

Previous Next Cancel

Milestone 6 -Editing of Page Layouts

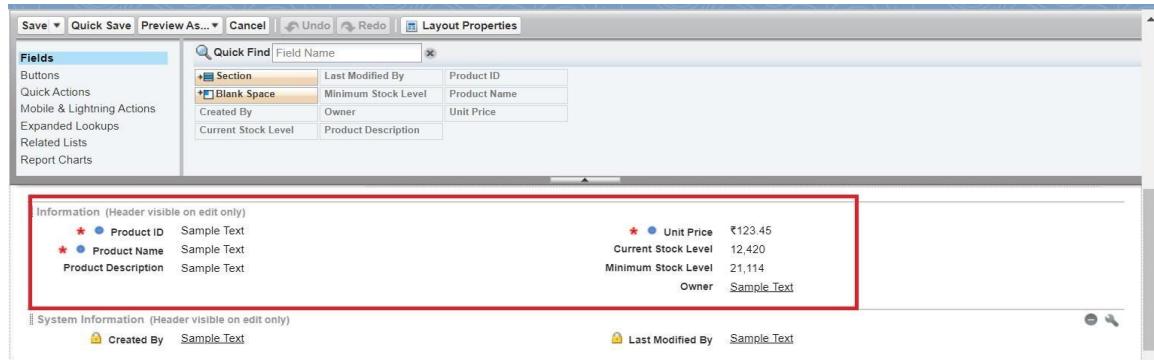
Page layouts in Salesforce are used to customize the organization, structure, and content of pages for viewing and editing records. They determine which fields, related lists, and custom links are visible to users, as well as the order and grouping of those elements.

Activity 1: To edit a Page Layout in Product Object

Go to setup >> click on Object Manager >> type object name(Product) in quick find box >> click on the Product object >> Page Layouts .

Click on the Product Layout.

Drag and Arrange the field as shown below.



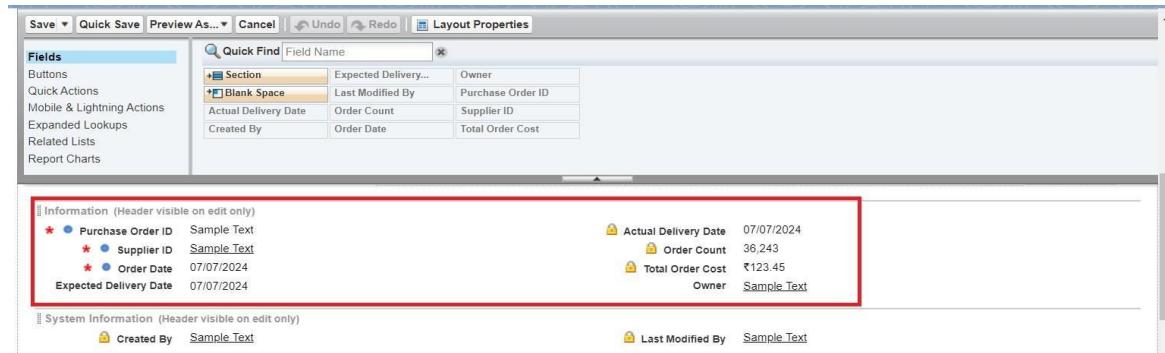
Click on Save.

Activity 2: To edit a Page Layout in Purchase Order Object

Go to setup >> click on Object Manager >> type object name(Purchase Order) in quick find box >> click on the Purchase Order object >> Page Layouts.

Click on the Purchase Order Layout

Drag and Arrange the field as shown below



Click on field Order Date >> click on settings >> select Required and save it.

Click on field Total Order Cost >> click on settings >> select Read Only and save it.

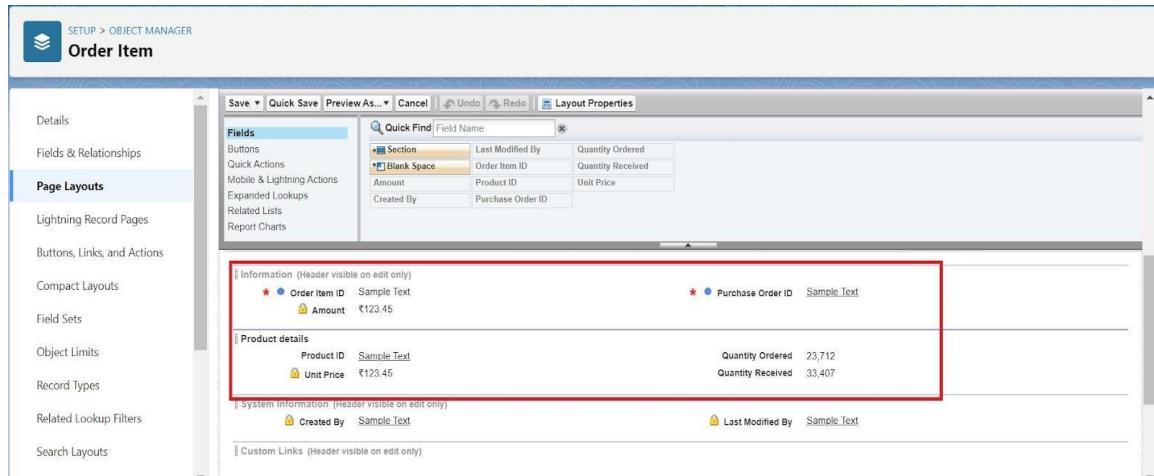
Click Save.

Activity 3: To edit a Page Layout in Order Item Object

Go to setup >> click on Object Manager >> type object name(Order Item) in quick find box >> click on the Order Item object >> Page Layouts.

Click on the Order Item Layout

Drag and Arrange the field as shown below



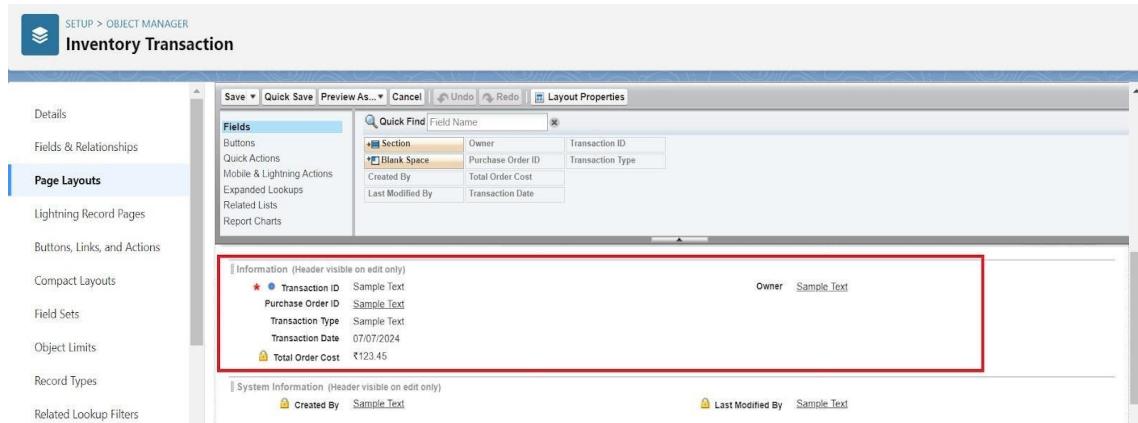
Click Save.

Activity 4: To edit a Page Layout in Inventory Transaction Object

Go to setup >> click on Object Manager >> type object name(Inventory Transaction) in quick find box >> click on the Inventory Transaction object >> Page Layouts.

Click on the Inventory Transaction Layout

Drag and Arrange the field as shown below



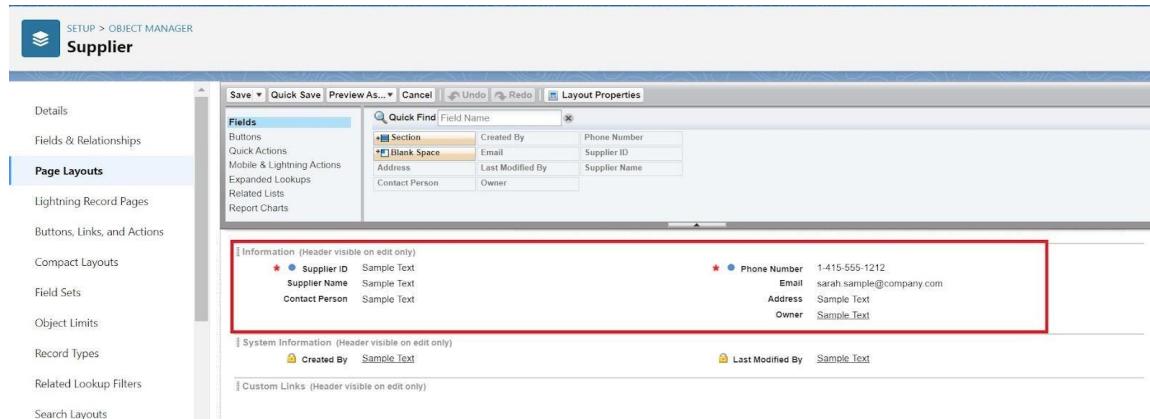
Click Save.

Activity 5: To edit a Page Layout in Supplier Object

Go to setup >> click on Object Manager >> type object name(Supplier) in quick find box >> click on the Supplier object >> Page Layouts.

Click on the Supplier Layout

Drag and Arrange the field as shown below



Click Save.

Milestone 7 - Compact Layouts

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

Activity 1: To create a Compact Layout to a Product Object

Go to setup >> click on Object Manager >> type object name(Product) in quick find box >> click on the Product object

Click on Compact Layouts in the sidebar .

Click on New.

Enter the Label as “Product Compact Layout”.

Select the Compact Layout Fields : Select Product name, Unit Price, Current Stock Level.

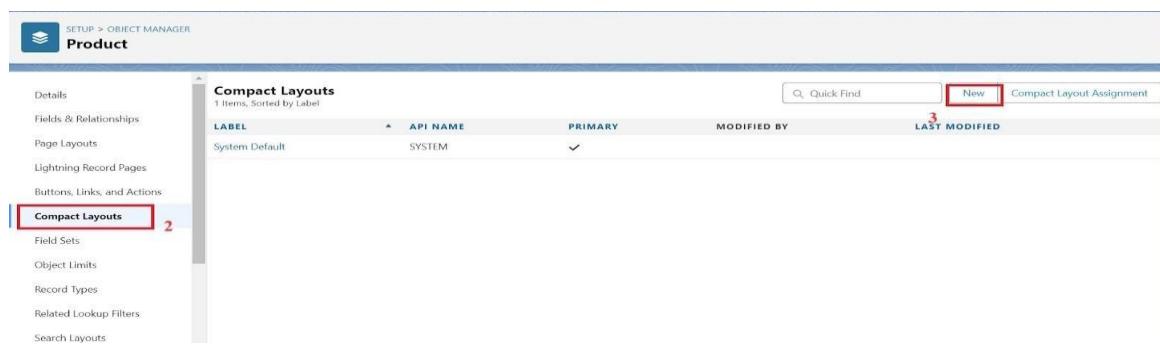
Click Save.

Click Compact Layout Assignment.

Click Edit Assignment.

Choose "Product Compact Layout" from the dropdown.

Click Save.



Enter Compact Layout Information

Label: Product Compact Layout **4**
 Name: Product_Compact_Layout

Select Compact Layout Fields

Available Fields	Selected Fields
Created By Last Modified By Minimum Stock Level Owner Product ID	Product Name Unit Price Current Stock Level 5

Add Remove Top Up Down Bottom

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

6 Save Cancel

Product Compact Layouts Compact Layout Assignment

Save Cancel

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

Activity 2: To create a Compact Layout to a Purchase Order Object

Go to setup >> click on Object Manager >> type object name(Purchase Order) in quick find box >> click on the Purchase Order object

Click on Compact Layouts in the sidebar .

Click on New.

Enter the Label as “Purchase Order Compact Layout”.

Select the Compact Layout Fields : Select Purchase Order ID, Order Date, Total Order Cost, Supplier ID.

Click Save.

Click Compact Layout Assignment.

Click Edit Assignment.

Choose "Purchase Order Compact Layout" from the dropdown.

Click Save.

Compact Layout Edit

Enter Compact Layout Information

Label: Purchase Order Compact L **4**

Name: Purchase_Order_Compact

Select Compact Layout Fields

Available Fields: Actual Delivery Date, Created By, Expected Delivery Date, Last Modified By, Owner, Order Count

Selected Fields: Purchase Order ID, Order Date, Total Order Cost, Supplier ID **5**

Add, Remove, Top, Up, Down, Bottom

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

Save Cancel **6**

Purchase Order 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: Purchase Order Compact Layout **9**

Save Cancel **10**

Milestone 8 - Validation Rules

Validation rules in Salesforce are used to ensure data integrity by preventing users from saving invalid data in records. They consist of a formula or expression that evaluates the data in one or more fields and return a value of true or false. When the rule's criteria are met (i.e., the expression evaluates to true), an error message is displayed, and the user is prevented from saving the record until the issue is resolved.

Activity 1: To create an Expected Delivery Date Validation rule to a Employee Object

Go to setup >> click on Object Manager >> type object name(Purchase Order) in quick find box>> click on the Purchase Order object

Click on the validation rule >> click on New.

Enter the Rule name as “Expected Delivery Date Validation”.

Select Active

Insert the Error Condition Formula as :

(Expected_Delivery_Date_c - 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

Rule Name: Expected_Delivery_Date_Validation 3

Active: 4

Description: 4

Error Condition Formula

Example: Discount_Percent_c>0.30 More Examples

Display an error if Discount is more than 30%

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

5 (Expected_Delivery_Date_c - Order_Date_c)> 7

Quick Tips

- Operators & Functions

* = Required Information

Enter the Error Message as “The Expected Delivery Date should not exceed 7 days.”.

Select the Error location as Top of Page

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

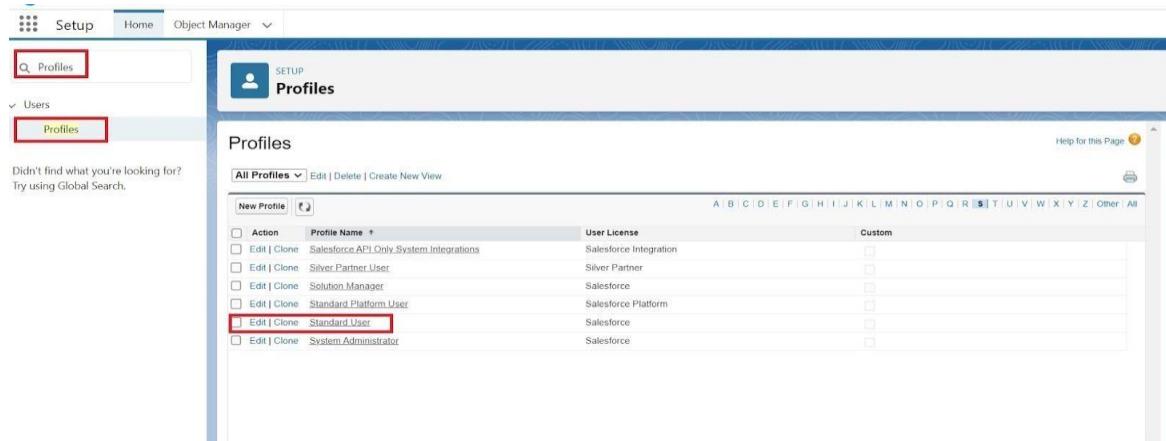
Milestone 9 - Profiles

Profiles in Salesforce are fundamental to the platform's security model, defining what users can do within the organization. Profiles control a user's permissions to objects,

fields, tabs, apps, and other settings. Each user in Salesforce must be assigned a profile, and the profile assigned to a user determines what they can see and do in the system.

Activity 1: To create an Inventory Manager Profile

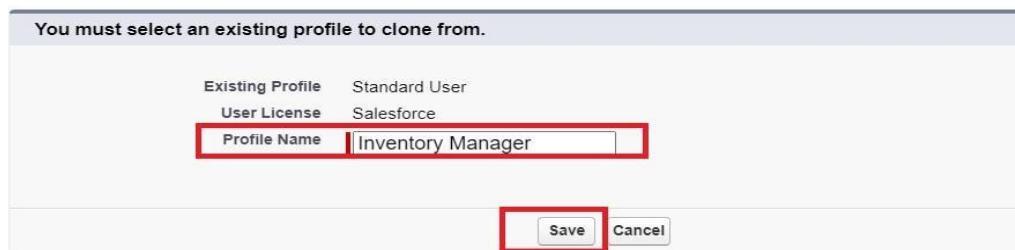
Go to setup >> type profiles in quick find box >> click on profiles >> clone the desired profile (Standard User) >> enter profile name (Inventory Manager) >> Save.



The screenshot shows the Salesforce Setup interface with the 'Profiles' tab selected. A search bar at the top left contains the text 'Profiles'. Below the search bar, there's a sidebar with 'Users' expanded, showing 'Profiles' selected. The main area is titled 'Profiles' and contains a table with columns for 'Action', 'Profile Name', and 'User License'. The 'Profile Name' column lists several profiles: 'Salesforce API Only System Integrations', 'Silver Partner User', 'Solution Manager', 'Standard Platform User', 'Standard User' (which is highlighted with a red box), and 'System Administrator'. The 'User License' column lists corresponding license types: 'Salesforce Integration', 'Silver Partner', 'Salesforce', 'Salesforce Platform', 'Salesforce', and 'Salesforce'. At the bottom of the table, there are links for 'A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | All'.

Clone Profile

Enter the name of the new profile.



The dialog box has a header 'You must select an existing profile to clone from.' Below it, there are fields for 'Existing Profile' (set to 'Standard User') and 'User License' (set to 'Salesforce'). A 'Profile Name' field contains the text 'Inventory Manager' (which is highlighted with a red box). At the bottom are 'Save' and 'Cancel' buttons.

While still on the profile page, then click Edit.

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__Lightning_Sales)	<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"/>			

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 <small>i</small>	Modify All <small>i</small>		
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"/>							

Change the password policies as mentioned :

User passwords expire in should be “ never expires ”.

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"/>
Obfuscate 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"/> <small>i</small>

Activity 2: To create an Purchase Manager Profile

Go to setup >> type profiles in quick find box >> click on profiles >> clone the desired profile (Standard User) >> enter profile name (Purchase Manager) >> Save. While still on the profile page, then click Edit.

Select the Custom App settings as default for the Medical Inventory Management.

Set the permissions and page layouts for this profile.

Profile Edit

Name: Purchase Manager
User License: Salesforce
Description:
Custom Profile:

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"/>			

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	Modify All
Inventory Transactions	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Order Items	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Products	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Purchase Orders	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Suppliers	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Change the password policies as mentioned :

User passwords expire in should be “ never expires ”.

Minimum password length should be “ 8 ”, and click save.

Password Policies

User passwords expire in: Never expires

Enforce password history: 3 passwords remembered

Minimum password length: 8

Password complexity requirement: Must include alpha and numeric characters

Password question requirement: Cannot contain password

Maximum invalid login attempts: 10

Lockout effective period: 15 minutes

Obscure secret answer for password resets:

Require a minimum 1 day password lifetime:

Don't immediately expire links in forgot password emails:

Milestone 10 - Roles

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

Activity 1 : Create a Purchasing Manager Role.

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

Setup Home Object Manager

roles

Users Roles

Feature Settings

Sales

Contact Roles on Contracts

Contact Roles on Opportunities

Service

Case Teams

Case Team Roles

Contact Roles on Cases

Didnt find what you're looking for? Try using Global Search.

SETUP Roles

Help for this Page

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

CEO, President CFO, VP, Sales

Western Sales Director of Western Sales

Western Sales Rep OR Sales Rep

Eastern Sales Director of Eastern Sales

Eastern Sales Rep NY Sales Rep

International Sales Director of International Sales

Asian Sales Rep European Sales Rep

* View & edit data, and up to 100 reports for all users below this role, or for all users of other Executive Staff

* View & edit data, roll up thresholds, & generate reports for all users below this role, or for all users above or at same level

* View & edit data, roll up thresholds, & generate reports for all users below this role, or for all users above or at same level

Set Up Roles

Don't show this page again

Click on Expand All and click on add role under SVP, Sales C Marketing role.
Give Label as “Purchasing Manager” and Role name gets auto populated. Then click on Save.

SETUP



Roles

Role Edit
New Role

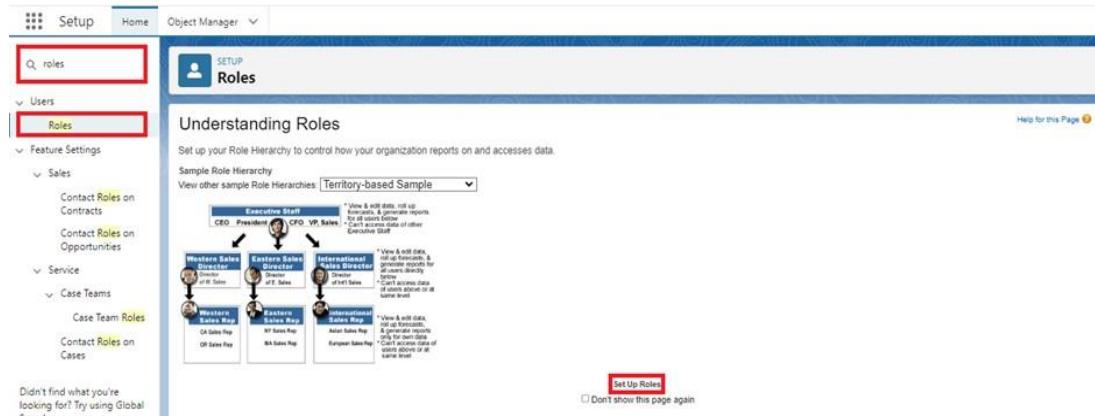
Role Edit

Label	Purchasing Manager
Role Name	Purchasing_Manager <small>i</small>
This role reports to	SVP, Sales & Marketing <small>🔍</small>
Role Name as displayed on reports	<input type="text"/>

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

Activity 2 : Create a Purchasing Manager Role.

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



The screenshot shows the Salesforce Setup interface. On the left, there's a navigation sidebar with categories like Setup, Home, Object Manager, and a search bar labeled "roles". Under "Users", the "Roles" item is selected and highlighted with a red box. The main content area is titled "Understanding Roles" and contains a "Role Hierarchy" diagram. The hierarchy starts with "President" at the top, followed by "CEO", "CFO", "VP Sales", and "Executive Staff". Below them are "Western Sales", "Eastern Sales", and "International Sales" managers, each with their own staff. A note next to the hierarchy says: "View & edit data, not up or down from this level. For all users below this level, can't edit or view data of other users or other users' data." At the bottom right of the content area is a red box around the "Set Up Roles" button.

Click on Expand All and click on add role under SVP, Sales C Marketing role.
 Give Label as “Inventory Manager” and the Role name gets auto populated. Then click on Save.

The screenshot shows the Salesforce Setup interface under the Roles section. A new role is being created, named 'Inventory Manager'. The 'Label' field contains 'Inventory Manager', the 'Role Name' field contains 'Inventory_Manager', and the 'This role reports to' field is set to 'SVP, Sales & Marketing'. The 'Save' button at the bottom is highlighted with a red box.

Role Edit
New Role

Role Edit

Label: Inventory Manager

Role Name: Inventory_Manager

This role reports to: SVP, Sales & Marketing

Role Name as displayed on reports:

Save Save & New Cancel

Milestone 12 - Permission Sets

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

Activity 1 : Create a Permission Set.

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 has sections for 'Users', 'Permission Set Groups' (with 'Permission Sets' highlighted), 'Custom Code', and 'Custom Permissions'. A search bar at the top says 'Q. Permission'. The main area is titled 'Permission Sets' with the sub-instruction 'On this page you can create, view, and manage permission sets.' Below is a table with columns: Action, Permission Set Label, Description, and License. The table lists various permission sets like 'Buyer', 'CRM User', etc. At the bottom, there are navigation links for '1-25 of 45' and '0 Selected'.

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

The screenshot shows the 'Create Permission Set' dialog. It has fields for 'Label' (set to 'Purchase Manager Create Access'), 'API Name' (set to 'Purchase_Manager'), and 'Description'. There is also a 'Session Activation Required' checkbox. At the top right are 'Save' and 'Cancel' buttons. A note at the top right says 'I = Required Information'.

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. Under 'Object Permissions', the 'Read' and 'Create' checkboxes are checked under the 'Enabled' column. At the top right of each section are 'Save' and 'Cancel' buttons.

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.

Select Users to Assign

Active Users

Full Name	Alias	Username	Role	Active	Profile
Annapurna Gurrum	AGurr	medicalinventory@sb.com	System Administrator	<input checked="" type="checkbox"/>	
Chatter Expert	Chatter	chatty.00dd0000058bqlua.yrgohck7wijo@chatter.salesforce.com	Chatter Free User	<input checked="" type="checkbox"/>	
Integration User	integ	integration@00dd0000058bqlua.com	Analytics Cloud Integration User	<input checked="" type="checkbox"/>	
John PurchaseM	jpurc	john@purchasem.com	Purchasing Manager	<input checked="" type="checkbox"/>	Purchase Manager
Security User	sec	insightssecurity@00dd0000058bqlua.com	Analytics Cloud Security User	<input checked="" type="checkbox"/>	

Cancel **Next**

Select No Expiration date >> Click on Assign.

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 (1)
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

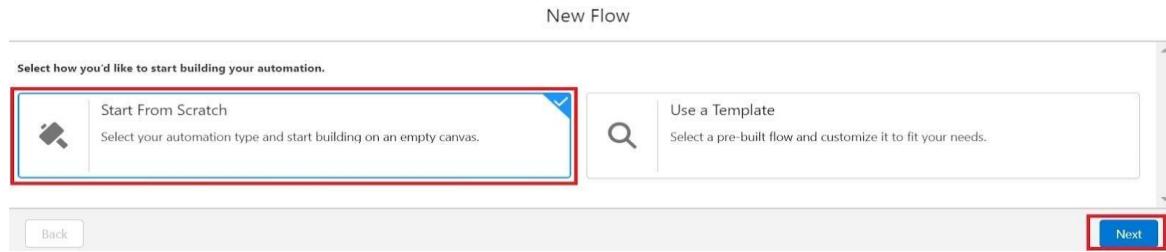
Cancel **Back** **Assign**

Milestone 13 - Flows

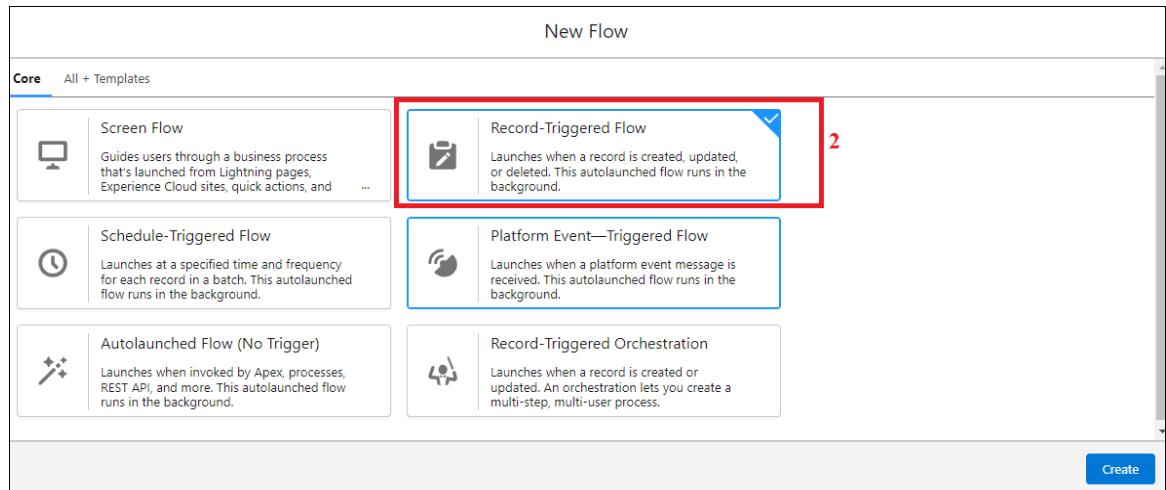
Flows in Salesforce, part of the Lightning Flow product, are powerful automation tools that help you collect data and perform actions in your Salesforce environment. Flows can be used to automate business processes, guide users through tasks, and integrate with external systems. They are highly versatile and can be configured to meet a wide range of business requirements without the need for custom code.

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

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

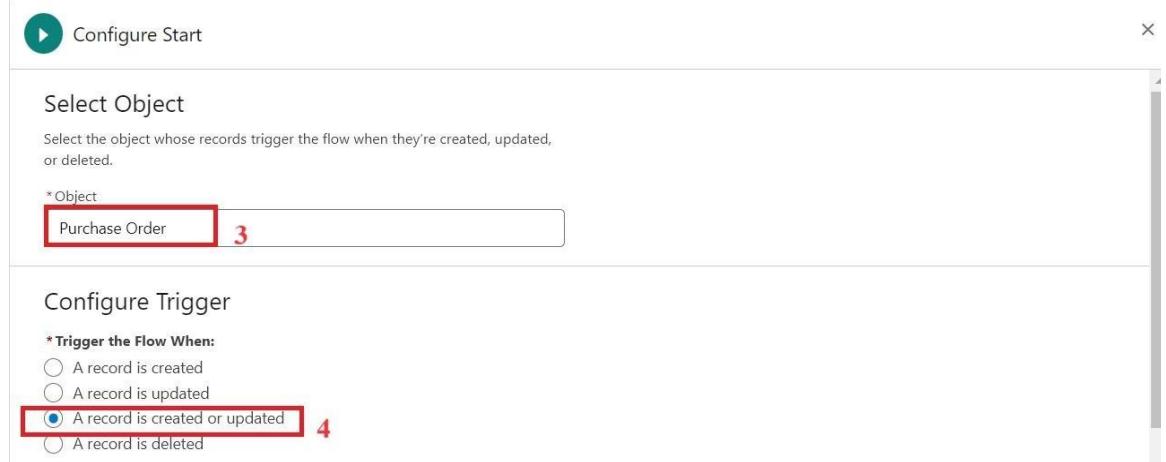


Select the record Triggered flow.Click on create.



Under Object select “Purchase Order”

Select A record is created or updated



Set Entry Conditions : None

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.

6

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

Under the record trigger flow click on the “+” icon and select Get Records.

Enter Label as “ Get Purchase Record ”.

For Object select Purchase Order.

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: \$Record > Record ID

+ Add Condition

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

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

[+ Add Field](#)

In the Flow Builder, click on the Manager tab on the left-hand side >> Click on New Resource >> In the Resource Type dropdown, select Variable.

Enter API name as ActualDeliveryDate >> Select Data type as Date >> Click on Done.

From the Toolbox drag and drop Assignment element.

Enter the label as “Assignment”.

Set Variable Values:

- a) Variable : {!ActualDeliveryDate}
Operator : Equals
Value : {!\$Record.Order_Date_c}
- b) Variable : {!ActualDeliveryDate}
Operator : Add
Value : 3

Assignment

* Label: Assignment

* API Name: Assignment_1

Description:

Set Variable Values

Each variable is modified by the operator and value combination.

Variable: ActualDeliveryDate	Operator: Equals	Value: \$Record > Order Date
Variable: ActualDeliveryDate	Operator: Add	Value: 3

+ Add Assignment

Click Done

From the Toolbox drag and drop Update Records element and connect to the Assignment element.

Enter the label as “Updating Purchasing Order”.

How to Find Records to Update and Set Their Values : Use the Purchase Order record that triggered the flow

Set Filter Conditions : None -Always Update Record

Set Field Values for the Trip Record as

Field : Actual_Delivery_Date_c

Value : {!ActualDeliveryDate}

Milestone 14 - Triggers

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

Activity 1 : Create a Trigger to Calculate total amount on Order Item.

Step 1 : Login to Salesforce:

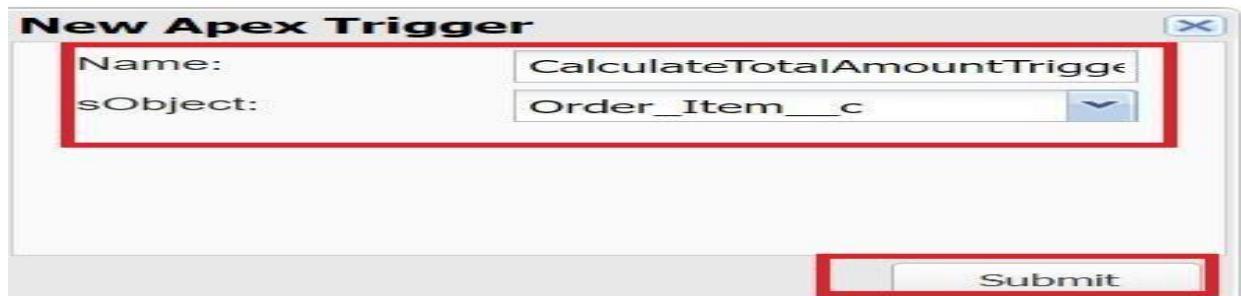
Log in to your Salesforce account with administrative privileges.

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;
}
}
```

Save it.

The screenshot shows the 'Update Records' configuration screen. It includes sections for 'How to Find Records to Update and Set Their Values', 'Set Filter Conditions', and 'Set Field Values for the Purchase Order Record'. The 'Field' and 'Value' columns for the first record are highlighted with a red box. A note at the bottom states: '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.'

\* 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

Condition Requirements to Update Record

None—Always Update Record

Set Field Values for the Purchase Order Record

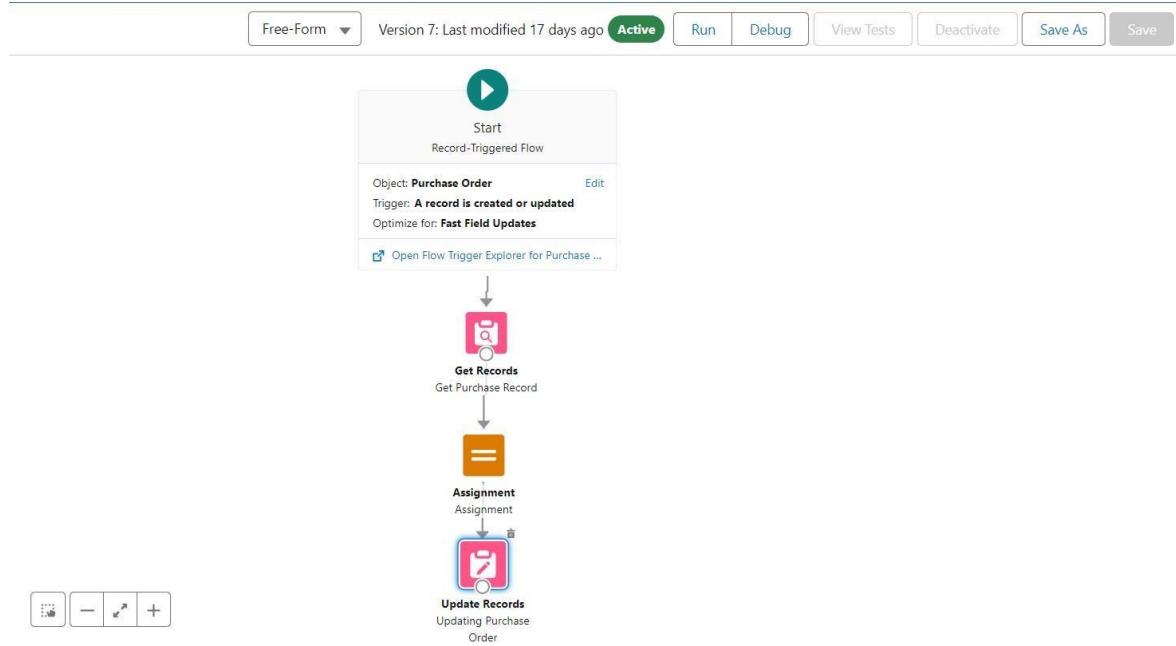
| Field                   | Value              |
|-------------------------|--------------------|
| Actual_Delivery_Date__c | ActualDeliveryDate |

+ Add Field

Click Done

Save the flow as “Actual Delivery Date Updating”.

Activate the flow.



## Milestone 15 - Reports

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

### 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' and 'All'. The 'All' category is selected. In the center, a search bar says 'Select a Report Type' with 'Q. Purchase' typed in. Below it, a list of report types is shown, with 'Purchase Orders' highlighted. To the right, a 'Details' panel for 'Purchase Orders' is open, showing its standard report type status and a 'Start Report' button.

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

The screenshot shows the 'Filters' section. It includes an 'Outline' tab and a 'Filters' tab which is selected. Under 'Filters', there's a search bar with 'Add filter...' and a 'Show Me' section. The 'Show Me' section contains two items: 'All purchase orders' and 'Actual Delivery Date All Time', both of which are highlighted with a red box.

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

8. Click save and run

9. Give report name – Purchase Orders based on Suppliers.

10. Click Save

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

(What you selects in "Select a report type option")

## View Report

1. Click on App Launcher on the left side of the screen.
2. Search Medical Inventory Management App & click on it.
3. Click on Reports Tab.
4. Click on Purchase Orders based on Suppliers and see records.

| Total Records                                                        | Total Order Count                                          | Total Total Order Cost               |                                           |
|----------------------------------------------------------------------|------------------------------------------------------------|--------------------------------------|-------------------------------------------|
| 5                                                                    | 14                                                         | ₹26,325.00                           |                                           |
| Report: Purchase Orders<br><b>Purchase Orders based on Suppliers</b> |                                                            |                                      |                                           |
| <input type="checkbox"/> Supplier ID                                 | <input type="checkbox"/> Purchase Order: Purchase Order ID | <input type="checkbox"/> Order Count | <input type="checkbox"/> Total Order Cost |
| <input type="checkbox"/> 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                                 |
| <input type="checkbox"/> Supplier-002 (1)                            | Purchase-0005 (1)                                          | 2                                    | ₹4,500.00                                 |
| <b>Total (5)</b>                                                     |                                                            | <b>14</b>                            | <b>₹26,325.00</b>                         |

## 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

The screenshot shows the 'Filters' section of a reporting tool. At the top, there's a 'Filters' button with a dropdown arrow. Below it is a search bar with the placeholder 'Add filter...' and a magnifying glass icon. A red box highlights a dropdown menu labeled 'Show Me' containing the option 'All purchase orders'. Another red box highlights a dropdown menu labeled 'Actual Delivery Date' containing the option '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

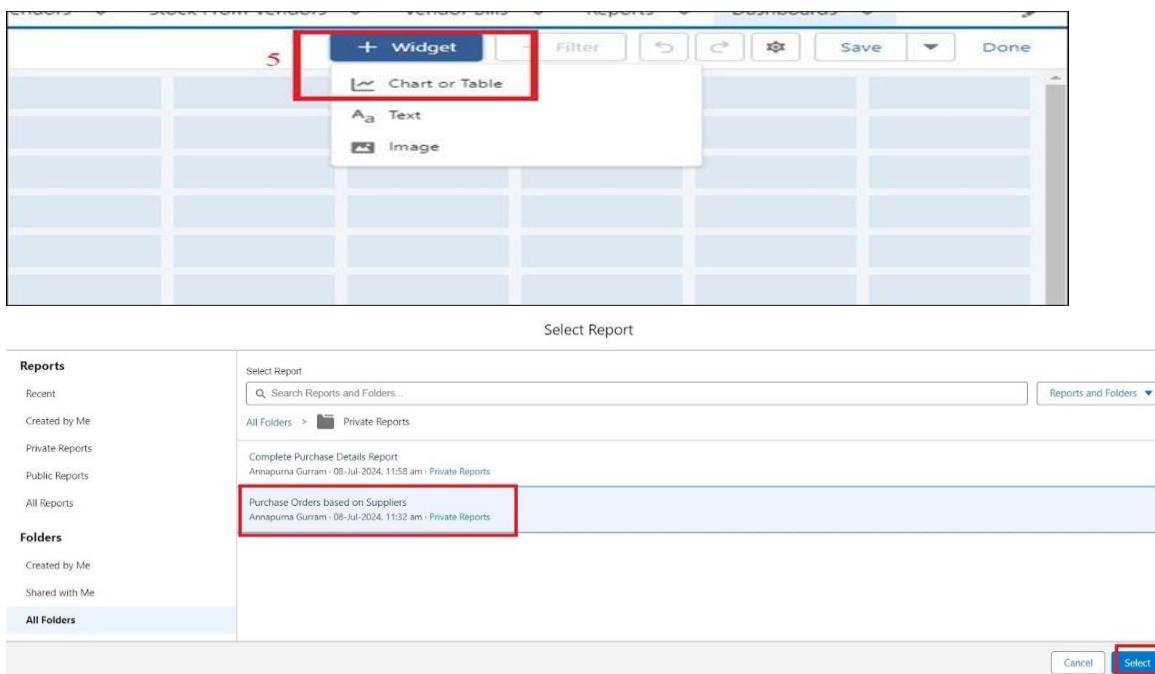
The screenshot shows the 'Complete Purchase Details Report' interface. The top navigation bar includes 'Products', 'Purchase Orders', 'Order Items', 'Inventory Transactions', 'Suppliers', 'Reports', and 'Dashboards'. The 'Reports' tab is selected. The main area displays a table with the following columns: Supplier ID, Actual Delivery Date, Purchase Order: Purchase Order ID, Product ID: Product ID, Order Count, Product ID: Product Name, Quantity Received, and Amount. The 'Supplier ID' and 'Actual Delivery Date' columns are grouped under 'Groups'. The 'Product ID: Product ID', 'Order Count', 'Product ID: Product Name', 'Quantity Received', and 'Amount' columns are grouped under 'Columns'. A red box highlights the 'Supplier ID' and 'Actual Delivery Date' groupings. Another red box highlights the 'Product ID: Product ID', 'Order Count', 'Product ID: Product Name', 'Quantity Received', and 'Amount' groupings. The bottom of the screen shows various reporting options like 'Row Counts', 'Detail Rows', 'Subtotals', and 'Grand Total' with checkboxes, and a 'Conditional Formatting' button.

# Milestone 16 - Dashboards

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

## Activity 1: - Create Dashboard

1. Click on the Dashboards tab from the Medical Inventory Management application.
2. Click on the new dashboard.
3. Give name - Medical Inventory DashBoard
4. Click create
5. Click on +widget
6. Select the Purchase Orders based on Suppliers Report
7. For the data visualization select any of the charts, tables etc. as per your choice/requirement
8. Click add.
9. Click save.



Add Widget

**Report**

Purchase Orders based on Suppliers X

Use chart settings from report i

**Display As**



**Value**

Sum of Total Order Cost

**Sliced By**

Supplier ID

**Dimension Units**

**Purchase Orders based on Suppliers**



Sum of Total Order Cost

Supplier ID

Supplier-001

Supplier-002

₹26k

₹4.5k

₹22k

[View Report \(Purchase Orders based on Suppliers\)](#)

Cancel
Add

Add Widget

**Title**

Purchase Orders based on Suppliers

**Subtitle**

**Footer**

**Legend Position**

Right

**Widget Theme**

Light (Dashboard default) 

Dark 

**Purchase Orders based on Suppliers**



Sum of Total Order Cost

Supplier ID

Supplier-001

Supplier-002

₹26k

₹4.5k

₹22k

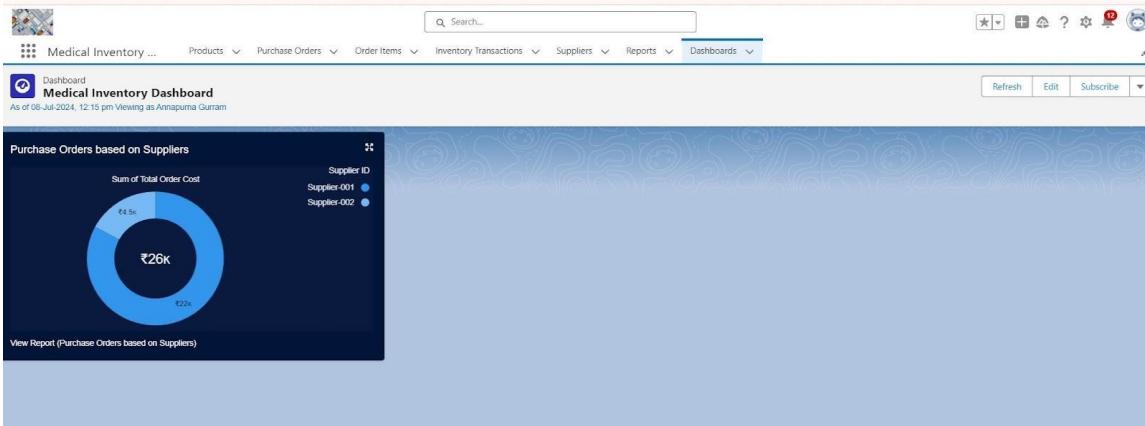
[View Report \(Purchase Orders based on Suppliers\)](#)

Cancel
Add

## Activity 2: 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



## Conclusion:

The Medical Inventory Management System project has successfully demonstrated the comprehensive capabilities of Salesforce as a powerful platform for managing complex business processes. Through this implementation, we have created a robust, scalable solution that addresses the critical needs of medical inventory management.