

MEDICAL INVENTORY MANAGEMENT

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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

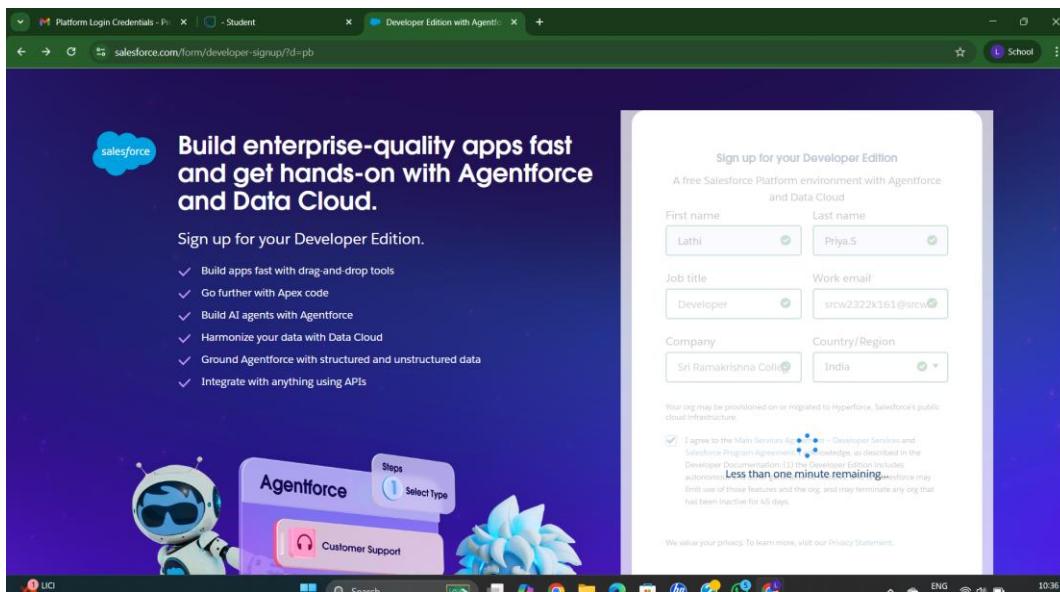
The purpose of medical inventory management is to ensure that hospitals and healthcare centers always have the right medicines, equipment, and supplies available when needed. It helps prevent shortages, avoid the use of expired items,

and reduce wastage. By controlling costs and maintaining accurate records, it supports smooth hospital operations while ensuring patient safety and quality care.

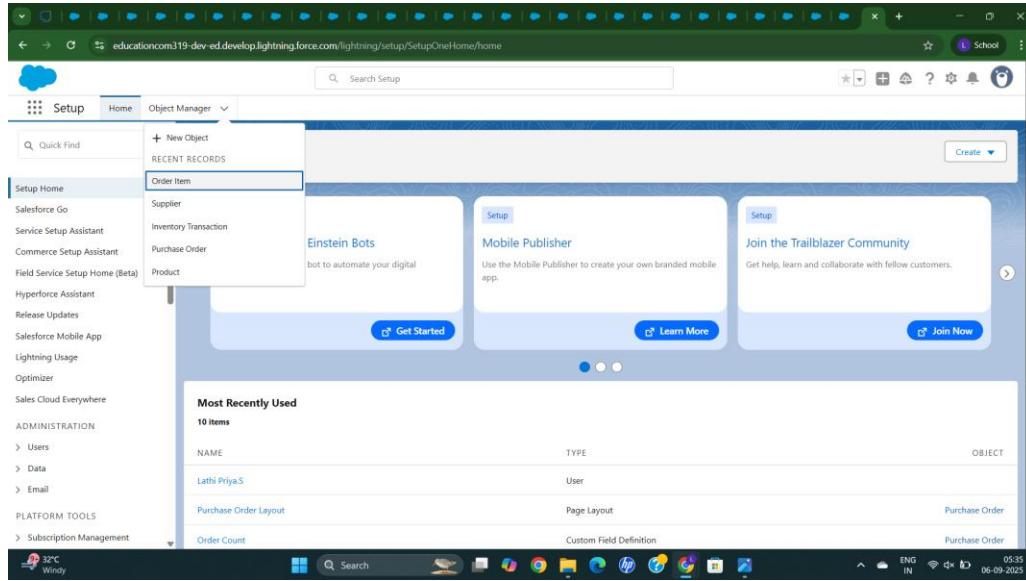
DEVELOPMENT PHASE

Creating Developer Account:

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



Creating Objects :Product, Purchase Order, Order Item, Inventory Transaction, Supplier



Creating a Tabs for Product, Purchase Order, Order Item, Inventory Transaction, Supplier

Action	Label	Tab Style	Description
Edit Del	Inventory Transactions	Scales	
Edit Del	Order Items	Box	
Edit Del	Products	Stethoscope	
Edit Del	Purchase Orders	Form	
Edit Del	Supplier objects	Building	

Creating a Lightning App for Medical Inventory Management

Screenshot of the Lightning Experience App Manager and a custom app navigation editor.

Lightning Experience App Manager:

App Name	Developer Name	Description	Last Modified Date	Type	Vis...
Bolt Solutions	LightningBolt	Discover and manage business solutions designed for your industry.	8/31/2025, 9:56 AM	Lightning	✓
Community	Community	Salesforce CRM Communities	8/31/2025, 9:56 AM	Classic	✓
Content	Content	Salesforce CRM Content	8/31/2025, 9:56 AM	Classic	✓
Data Cloud	Audience360	Build a thorough and complete understanding of your customers.	8/31/2025, 9:56 AM	Lightning	✓
Data Manager	DataManager	Use Data Manager to view limits, monitor usage, and manage recipes.	8/31/2025, 9:56 AM	Lightning	✓
Digital Experiences	SalesforceCMS	Manage content and media for all of your sites.	8/31/2025, 9:56 AM	Lightning	✓
Lightning Usage App	LightningInstrumentation	View Adoption and Usage Metrics for Lightning Experience	8/31/2025, 9:56 AM	Lightning	✓
Marketing CRM Classic	Marketing	Track sales and marketing efforts with CRM objects.	8/31/2025, 9:56 AM	Classic	✓
Medical Inventory Management	Medical_Inventory_Management		9/4/2025, 11:18 PM	Lightning	✓
My Service Journey	MSJApp	Discover new customer service capabilities.	8/31/2025, 9:56 AM	Lightning	✓
Platform	Platform	The fundamental Lightning Platform	8/31/2025, 9:56 AM	Classic	✓
Queue Management	QueueManagement	Create and manage queues for your business.	8/31/2025, 9:56 AM	Lightning	✓
Sales	Sales	The world's most popular sales force automation (SFA) solution	8/31/2025, 9:56 AM	Classic	✓
Sales	LightningSales	Manage your sales process with accounts, leads, opportunities, and	8/31/2025, 9:56 AM	Lightning	✓

Custom App Navigation Editor:

Medical Inventory Management App Navigation Items

Personalize your nav bar for this app. Reorder items, and rename or remove items you've added.

NAVIGATION ITEMS (7)

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

Add More Items

Cancel Save

Nothing to see here

There's nothing in your list yet. Try adding a new record.

Creating a field for Product

The screenshot shows the Salesforce Setup interface with the URL <https://orgfarm-5f8bc6f218-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01lgK0000022SNF/fieldsAndRelationships/view>. The page title is "Product". The left sidebar under "FIELDS & RELATIONSHIPS" includes links for Details, 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, Restriction Rules, and Scoping Rules. The main content area is titled "Fields & Relationships" and lists 8 items, sorted by Field Label. The table columns are FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The fields listed are:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Current Stock Level	Current_Stock_Level__c	Number(18, 0)		
Last Modified By	LastModifiedById	Lookup(User)		
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)		

Creating a field for Purchase Order

The screenshot shows the Salesforce Setup interface with the URL <https://orgfarm-5f8bc6f218-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01lgK0000022Sa9/fieldsAndRelationships/view>. The page title is "Purchase Order". The left sidebar under "FIELDS & RELATIONSHIPS" includes links for Details, 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, Restriction Rules, and Scoping Rules. The main content area is titled "Fields & Relationships" and lists 7 items, sorted by Field Label. The table columns are FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The fields listed are:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
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 objects)		✓

Creating a field for Order Item

The screenshot shows the Salesforce Setup interface with the following details:

- Setup Path:** SETUP > OBJECT MANAGER > Inventory Transaction
- Section:** Fields & Relationships
- Table Headers:** FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, INDEXED
- Table Data:** A list of fields including Created By, Inventory Transaction Name, Last Modified By, Owner, Purchase Order ID, Total Order Cost, Transaction Date, Transaction ID, and Transaction Type.
- Toolbar:** Includes New, Deleted Fields, Field Dependencies, and Set History Tracking buttons.

Creating a field for Inventory Transaction

Creating a field for Supplier

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, and Lightning Record Pages. The main content area displays the 'Fields & Relationships' section, which lists nine items sorted by Field Label. The table includes columns for Field Label, Field Name, Data Type, Controlling Field, and Indexed status. Fields listed include Address, Contact Person, Created By, Email, Last Modified By, Owner, Phone Number, Supplier ID, and Supplier Name.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Address	Address__c	Text Area(255)		
Contact Person	Contact_Person__c	Text(10)		
Created By	CreatedById	Lookup(User)		
Email	Email__c	Email		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		
Phone Number	Phone_Number__c	Phone		
Supplier ID	Supplier_ID__c	Text(10)		
Supplier Name	Name	Text(80)		

Editing a Page Layout for Product

The screenshot shows the Salesforce Object Manager interface for the 'Product' object. The left sidebar lists various setup options like Details, Fields & Relationships, and Page Layouts. The main content area displays the 'Page Layouts' section, which allows editing of the product page layout. It shows a preview of the layout with sections for Information, System Information, and Mobile Cards. The layout includes fields for Product ID, Product Name, Expiry Date, Last Modified By, Current Stock Level, Minimum Stock Level, Product Description, Product ID, Product Name, Unit Price, and Owner.

Editing a Page Layout for Purchase Order

Setup > OBJECT MANAGER
Purchase Order

Page Layouts

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
Restriction Rules
Scoping Rules

Fields

Section	Field Name	Type
Buttons	Expected Delivery...	Text
Quick Actions	Owner	Text
Mobile & Lightning Actions	Total Order Cost	Text
Expanded Lookups	Last Modified By	Text
Related Lists	Purchase Order ID	Text
Report Charts	Actual Delivery Date	Text
	Order Count	Text
	Purchase Order Name	Text
	Created By	Text
	Order Date	Text
	Supplier ID	Text

Information (Header visible on edit only)

- Purchase Order ID: Sample Text
- Supplier ID: Sample Text
- Order Date: 06/09/2025
- Expected Delivery Date: 06/09/2025
- Purchase Order Name: Sample Text

System Information (Header visible on edit only)

- Created By: Sample Text
- Last Modified By: Sample Text

Custom Links (Header visible on edit only)

Mobile Cards (Salesforce mobile only)

Drag expanded lookups and mobile-enabled Visualforce pages here to display them as mobile cards.

Editing a Page Layout for Order Item

Setup > OBJECT MANAGER
Order Item

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
Restriction Rules
Scoping Rules

Fields

Section	Field Name	Type
Buttons	Last Modified By	Text
Quick Actions	Order Item ID	Text
Mobile & Lightning Actions	Quantity Ordered	Text
Expanded Lookups	Order Item Name	Text
Related Lists	Quantity Received	Text
Report Charts	Created By	Text
	Product ID	Text
	Unit Price	Text

Information (Header visible on edit only)

- Order Item ID: Sample Text
- Amount: ₹123.45
- Order Item Name: Sample Text
- Product ID: Sample Text
- Unit Price: ₹123.45

System Information (Header visible on edit only)

- Created By: Sample Text
- Last Modified By: Sample Text

Custom Links (Header visible on edit only)

Mobile Cards (Salesforce mobile only)

Drag expanded lookups and mobile-enabled Visualforce pages here to display them as mobile cards.

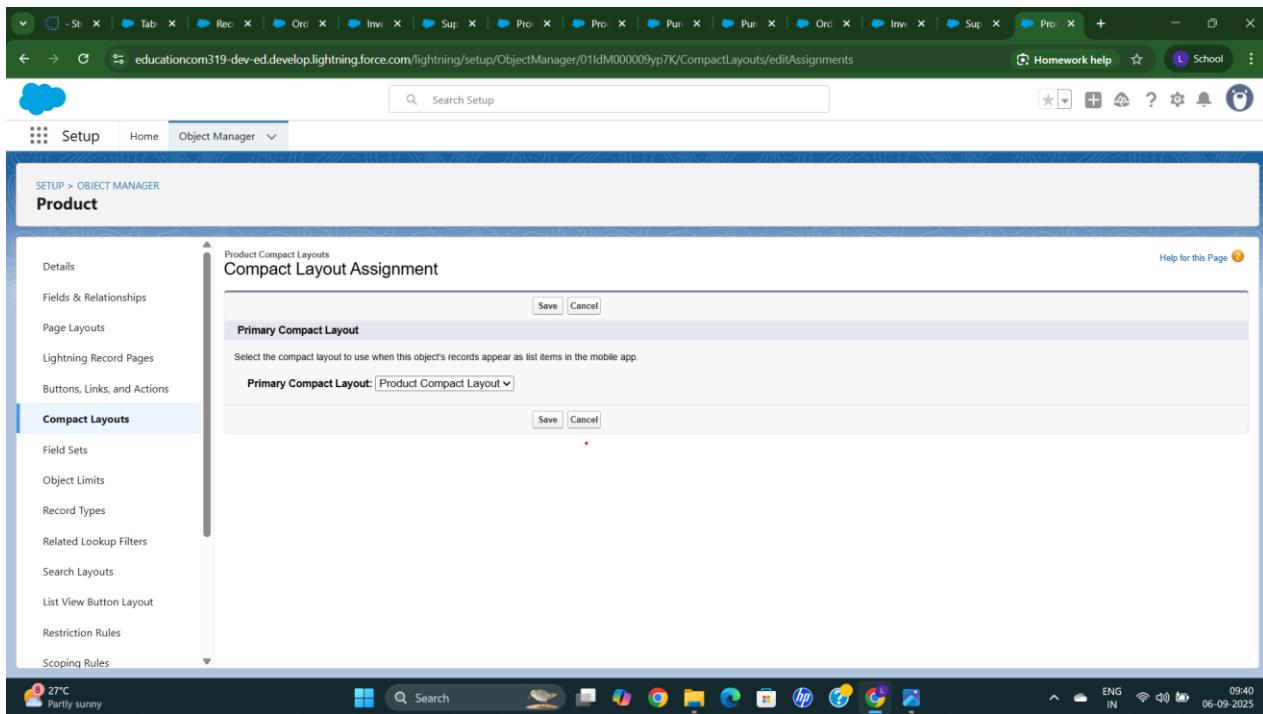
Editing a Page Layout for Inventory Transaction

The screenshot shows the Salesforce Setup interface with the title "SETUP > OBJECT MANAGER" and the object "Inventory Transaction". The left sidebar is expanded to show the "Page Layouts" section. The main area displays the page layout configuration for the "Inventory Transaction" object. A "Fields" section is visible, containing fields like "Section", "Blank Space", "Created By", "Purchase Order ID", "Inventory Transac...", and "Total Order Cost". A tooltip indicates that "Purchase Order ID" is currently in use. Below the fields are sections for "Information", "System Information", and "Custom Links". A "Mobile Cards" section is also present. The bottom of the screen shows the Windows taskbar with various application icons and the date/time.

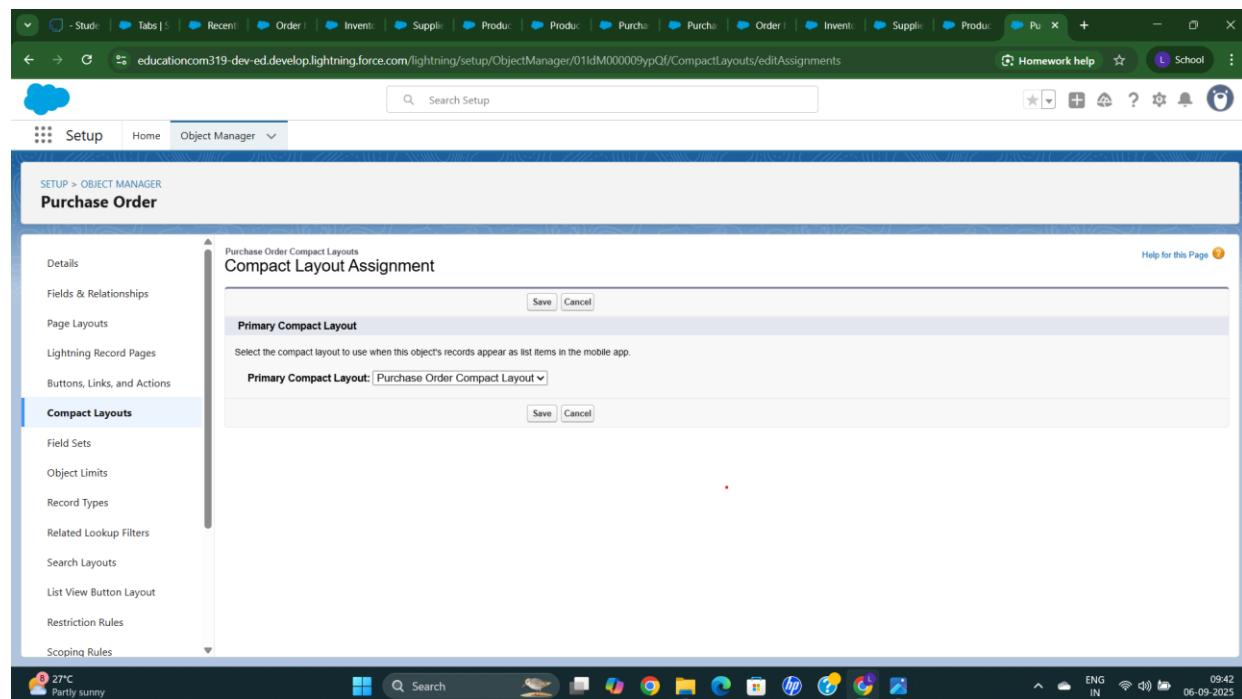
Editing a Page Layout for Supplier

The screenshot shows the Salesforce Setup interface with the title "SETUP > OBJECT MANAGER" and the object "Supplier". The left sidebar is expanded to show the "Page Layouts" section. The main area displays the page layout configuration for the "Supplier" object. A "Fields" section is visible, containing fields like "Section", "Blank Space", "Created By", "Email", "Address", "Last Modified By", "Contact Person", "Phone Number", "Supplier ID", "Supplier Name", and "Owner". A "Supplier Detail" section is displayed, showing standard buttons for Edit, Delete, Clone, Change Owner, Change Record Type, Printable View, Sharing, Sharing Hierarchy, and Edit Labels. Below the detail section are sections for "Information", "System Information", and "Custom Links". A "Mobile Cards" section is also present. The bottom of the screen shows the Windows taskbar with various application icons and the date/time.

Create a Compact Layout for a Product Object



Create a Compact Layout for Purchase Object



Create a validation Rule for Employee in Purchase Object

The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes tabs for Setup, Home, and Object Manager. The main content area displays a validation rule titled "Purchase Order Validation Rule". The rule details are as follows:

- Validation Rule Detail**
- Rule Name:** Expected_Delivery_Date__Validation
- Error Condition Formula:** (Expected_Delivery_Date__c - Order_Date__c) > 7
- Error Message:** The Expected Delivery Date should not exceed 7 days.
- Description:** (empty)
- Created By:** Lathi Priya S. 06/09/2025, 9:45 am
- Active:** checked
- Error Location:** Top of Page
- Modified By:** Lathi Priya S. 06/09/2025, 9:45 am

The bottom of the screen shows a Windows taskbar with various icons and system status information.

Create a Profile for Inventory Management

The screenshot shows the Salesforce Enhanced Profiles page. The top navigation bar includes tabs for Setup, Home, and Object Manager. The main content area displays a profile named "Inventory Manager". The profile details are as follows:

- Name:** Inventory Manager
- User License:** Salesforce
- Description:** (empty)
- Created By:** Lathi Priya S. 06/09/2025, 9:47 am
- Custom Profile:** checked
- Modified By:** Lathi Priya S. 06/09/2025, 9:47 am

The "Page Layouts" section shows standard object layouts for various objects like Global, Email Application, Home Page Layout, Account, and Alternative Payment Method. The bottom of the screen shows a Windows taskbar with various icons and system status information.

educationcom319-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00edM00000IkyTR%3Fsetupid%3DEnhancedProfiles%26appLayout%3Dsetup%26to... School

Custom Object Permissions

Object	Basic Access				Data Administration			Basic Access				Data Administration		
	Read	Create	Edit	Delete	View All Records	Modify All Records	View All Fields	Read	Create	Edit	Delete	View All Records	Modify All Records	View All Fields
Albums	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>											
AppLogs	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>											
Artists	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>					
Inventory Transactions	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>											
Order Items	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>											

Platform Event Permissions

Event	Basic Access		Data Administration	
	Read	Create	Read	Create
AppLogEvents	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Session Settings

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login: Session security level required at login

Password Policies

User passwords expire in: Never expires

educationcom319-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00edM00000IkyTR%3Fsetupid%3DEnhancedProfiles%26appLayout%3Dsetup%26to... School

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
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"/>

Login Hours

No login hours specified

Login IP Ranges

No login IP ranges specified. Users from any IP address are allowed to log in.

Enabled Apex Class Access

Enabled Apex Class Access Help

Create a Profile for Purchase Object

The screenshot shows the Salesforce Setup interface for creating a new profile. The URL is <https://educationcom319-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00edM00000IkyjZ%3Fsetupid%3DEnhancedProfiles>. The page title is "Profiles". The profile being created is named "Purchase Manager". The "Profile Detail" section shows the profile name, user license (Salesforce), and a custom profile indicator. The "Page Layouts" section lists various standard object layouts and their assignments. The bottom of the screen shows the Windows taskbar with various application icons.

The screenshot shows the Salesforce Setup interface for creating a new permission set. The URL is <https://educationcom319-dev-ed.lightning.force.com/lightning/setup/PermSets/page?address=%2F0PSdM00000M0xBX%3Fo%3D01lM000009ykuv%26s%3DEntityPermissions%26ffd1Frame...>. The page title is "Permission Sets". The permission set being created is named "Purchase Manager Create Access". The "Order Items" section shows the tab settings for the permission set. The "Object Permissions" section lists various permissions like Read, Create, Edit, Delete, etc., with checkboxes for enabling them. The "Field Permissions" section is partially visible at the bottom. The bottom of the screen shows the Windows taskbar with various application icons.

Profiles

	Invoices	Labels	Leads	Legal Entities	Locations	Location Groups	Location Group Assignments	Work Orders	Work Plans	Work Plan Templates	Work Step Templates	Work Types	Work Type Groups
Read	<input type="checkbox"/>	<input checked="" type="checkbox"/>											
Create	<input type="checkbox"/>	<input checked="" type="checkbox"/>											
Edit	<input type="checkbox"/>	<input checked="" type="checkbox"/>											
Delete	<input type="checkbox"/>	<input checked="" type="checkbox"/>											
View All Records	<input type="checkbox"/>	<input checked="" type="checkbox"/>											
Modify All Records	<input type="checkbox"/>	<input checked="" type="checkbox"/>											
View All Fields	<input type="checkbox"/>	<input checked="" type="checkbox"/>											

Custom Object Permissions

	Basic Access	Data Administration	Basic Access	Data Administration
	Read Create Edit Delete	View All Records Modify All Records View All Fields	Read Create	View All Records Modify All Records View All Fields
Albums	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
AppLogs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Artists	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Inventory Transactions	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Order Items	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Products	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Purchase Orders	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Songs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Suppliers	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Track Lists	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Platform Event Permissions

	Basic Access	Basic Access
	Read Create	Read Create
AppLogEvents	<input type="checkbox"/>	<input type="checkbox"/>

Profiles

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login

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	<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"/>

Login Hours

No login hours specified

Login IP Ranges

No login IP ranges specified. Users from any IP address are allowed to log in.

Create a Role for Purchase Object

The screenshot shows the Salesforce Setup Roles page for the 'Purchasing Manager' role. The left sidebar shows navigation categories like Users, Feature Settings, Sales, Service, and Case Teams. The main content area displays the 'Role Detail' for the 'Purchasing Manager' role, which has a label of 'Purchasing Manager' and a role name of 'Purchasing_Manager'. It reports to 'SVP_Sales & Marketing'. The 'Role Detail' section includes fields for Modified By (Latika Priva S), Opportunity Access, and Case Access. Below this is a table titled 'Users in Purchasing Manager Role' with one entry: 'No records to display'. A help link 'Users in Purchasing Manager Role Help' is also present.

Create a Role for Inventory Transaction

The screenshot shows the Salesforce Setup Roles page for the 'Inventory Manager' role. The left sidebar is identical to the previous screenshot. The main content area displays the 'Role Detail' for the 'Inventory Manager' role, which has a label of 'Inventory Manager' and a role name of 'Inventory_Manager'. It reports to 'SVP_Sales & Marketing'. The 'Role Detail' section includes fields for Modified By (Latika Priva S), Opportunity Access, and Case Access. Below this is a table titled 'Users in Inventory Manager Role' with one entry: 'No records to display'. A help link 'Users in Inventory Manager Role Help' is also present.

Create a Permission Set for Purchasing Manager

The screenshot shows the Salesforce Setup interface. The left sidebar is expanded, showing 'Users' with 'Permission Sets' selected. The main content area is titled 'Permission Sets' and shows a 'Purchase Manager Create Access' permission set being created. The 'Object Settings' tab is selected. Under 'Order Items', there is a 'Tab Settings' section with 'Available' and 'Visible' columns. Under 'Object Permissions', a table lists permissions like Read, Create, Edit, Delete, etc., with checkboxes for 'Enabled'. A 'Field Permissions' section is also present. The status bar at the bottom shows system information and the date.

Permission Set
Purchase Manager Create Access

Object Settings Order Items

Tab Settings

Permission Name	Enabled
Read	<input checked="" type="checkbox"/>
Create	<input checked="" type="checkbox"/>
Edit	<input type="checkbox"/>
Delete	<input type="checkbox"/>
View All Records	<input type="checkbox"/>
Modify All Records	<input type="checkbox"/>
View All Fields	<input type="checkbox"/>

Field Permissions

Setup Home

Salesforce Go

Service Setup Assistant

Commerce Setup Assistant

Field Service Setup Assistant (Beta)

Hyperforce Assistant

Release Updates

Salesforce Mobile App

Lightning Usage

Optimizer

Sales Cloud Everywhere

ADMINISTRATION

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Giving Access to Purchasing Manager (John PurchaseM)

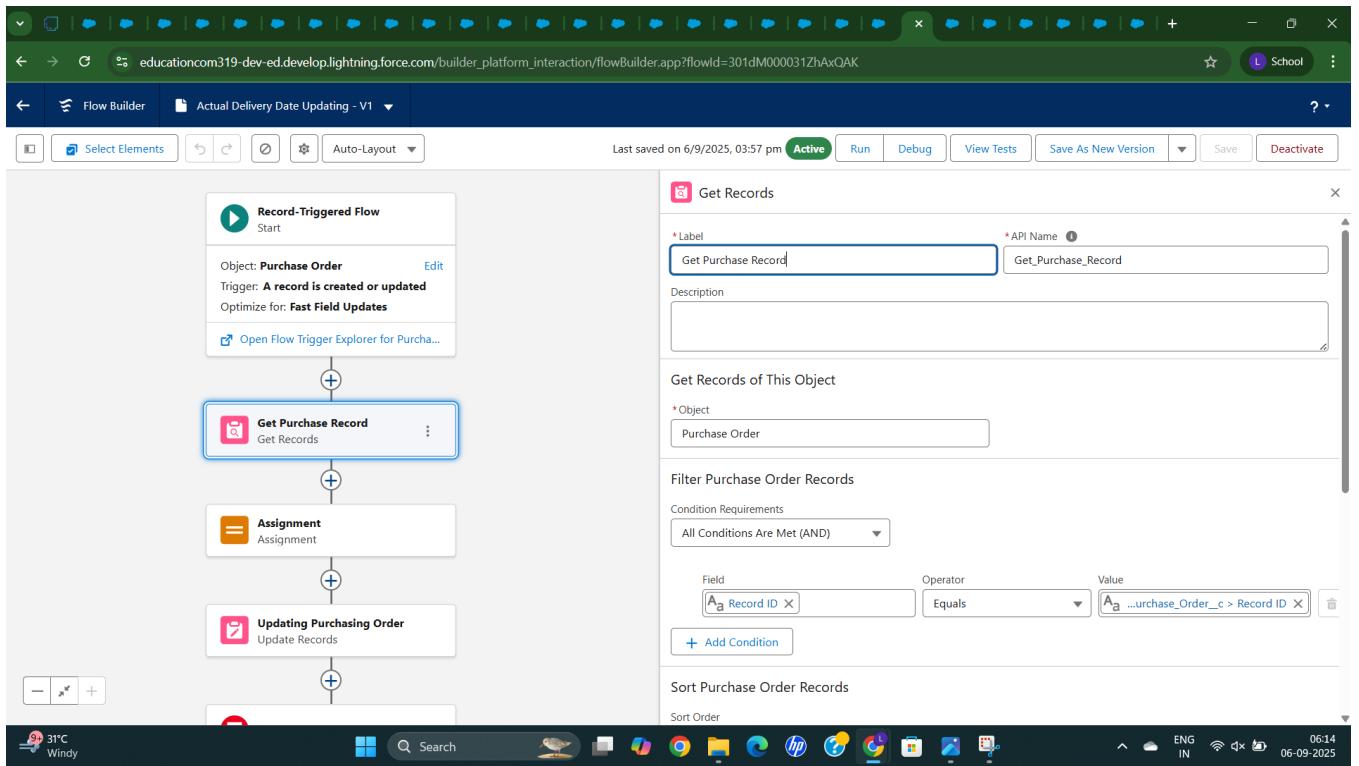
The screenshot shows the Salesforce Setup interface. In the top right corner, there is a green success message box that says "1 assignments were successful." Below this, the title "Purchase Manager Create Access" is displayed. Underneath, there is a table titled "Assignment Summary" with one row of data:

Full Name	User License	Expires On	Time Zone	Status
John PurchaseM	Salesforce			<input checked="" type="checkbox"/> Success

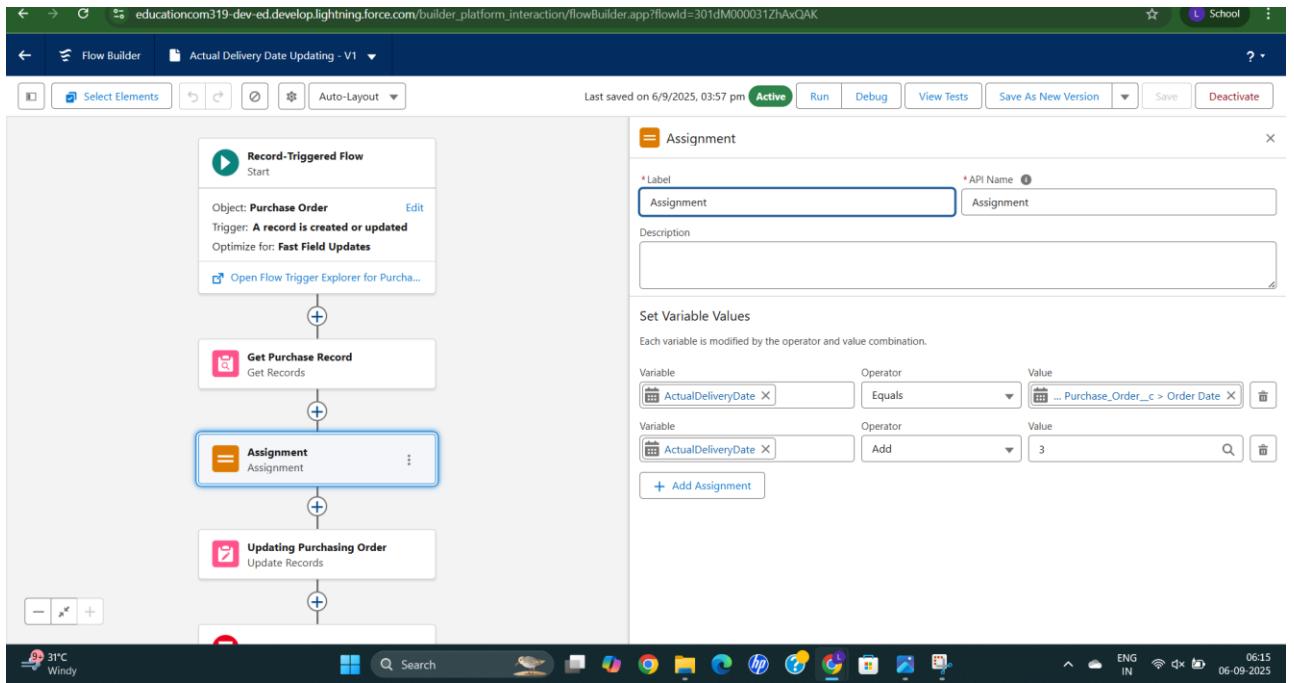
The left sidebar contains a navigation menu with various links such as "Setup Home", "Salesforce Go", "Service Setup Assistant", etc. At the bottom of the screen, there is a taskbar with icons for weather (34°C, Mostly sunny), search, file, and other system functions.

Create a Flow to Update the Delivery Date

First we created a Get Purchase Records



here we add a Assignment flow



After adding a Assignment flow we add Updating Purchasing Order

The screenshot shows the Flow Builder interface on a Windows desktop. The flow is titled "Actual Delivery Date Updating - V1".

Flow Details:

- Start:** Record-Triggered Flow (Purchase Order, Trigger: A record is created or updated, Optimize for: Fast Field Updates)
- Get Purchase Record:** Get Records
- Assignment:** Assignment
- Update Records:** Update Records (Actual Delivery Date)

Right Panel (Update Records):

- Description:** None
- 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
- Note:** 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:** None—Always Update Record
- Set Field Values for the Purchase Order Record:**

Field	Value
Actual Delivery Date	ActualDeliveryDate

System Status: 31°C Windy

The screenshot shows the Flow Builder interface on a Windows desktop. The flow is titled "Actual Delivery Date Updating - V1".

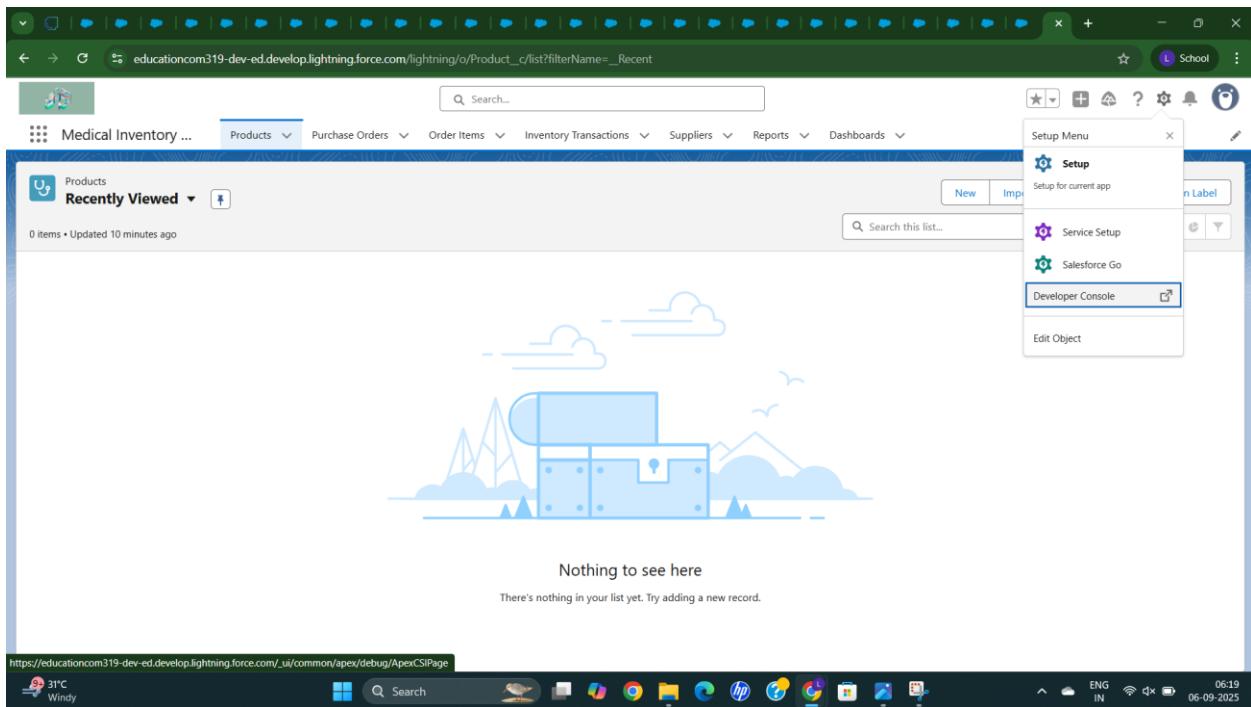
Flow Details:

- Start:** Record-Triggered Flow (Purchase Order, Trigger: A record is created or updated, Optimize for: Fast Field Updates)
- Get Purchase Record:** Get Records
- Assignment:** Assignment
- Update Records:** Update Records (Actual Delivery Date)

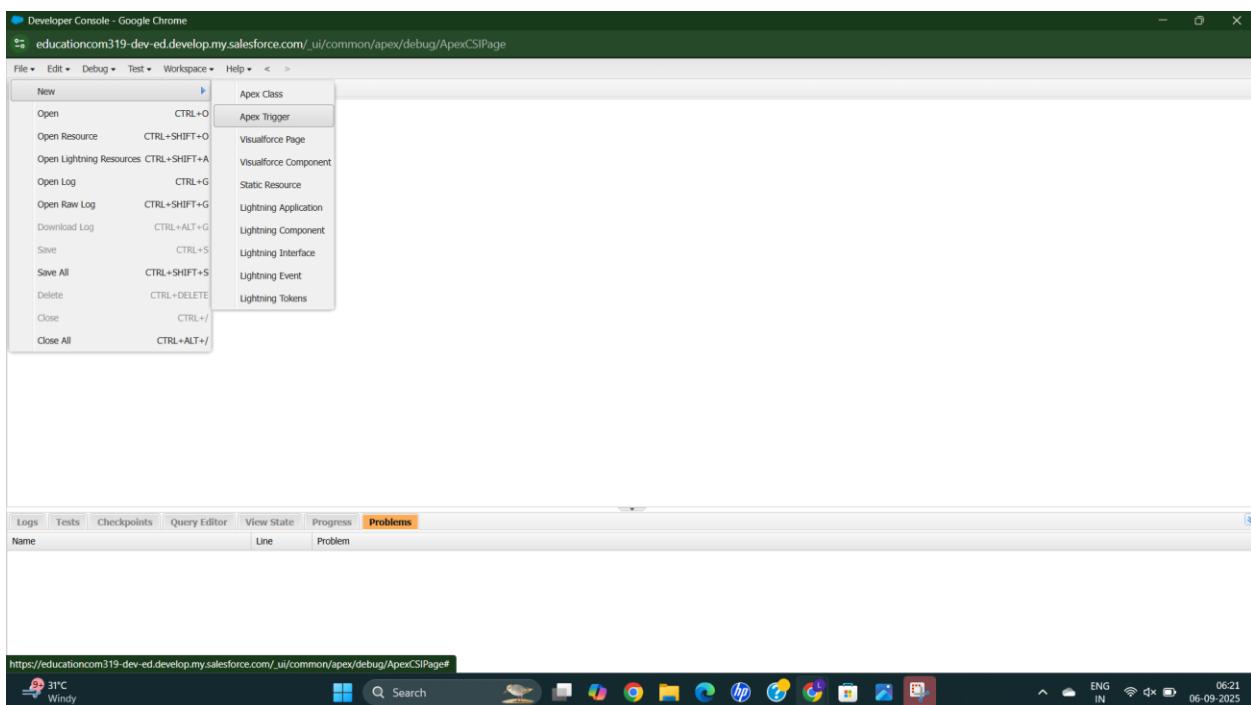
Right Panel (Update Records): Same as the first screenshot, showing the "Update Records" configuration for the Actual Delivery Date field.

System Status: Top Stories Piyush Goyal call... 04:15

Creating a Triggers in Developer Console



Creating a New Triggers



Creating a Triggers Class as CalculateTotalAmountTrigger

A screenshot of a computer desktop. At the top is a taskbar with various icons. Below it is a window titled "Developer Console - Google Chrome" showing Apex code in the "CalculateTotalAmountTrigger.apxt" tab. The code defines a trigger on the Order_Item__c object. The trigger calls a method in the CalculateTotalAmountHandler class. The handler has a static method calculateTotal that takes a list of new items, a list of old items, and boolean parameters for insert, update, delete, and undelete. The code then collects purchase order IDs affected by changes in Order_Item__c records and handles insert, update, and undelete scenarios. The browser window also shows tabs for Logs, Tests, Checkpoints, Query Editor, View State, Progress, and Problems, with the Problems tab selected. The status bar at the bottom shows weather (31°C Windy), system icons, and the date/time (06-09-2025).

```
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);
}
```

Creating a Class as CalculateTotalAmountHandler

A screenshot of a computer desktop. At the top is a taskbar with various icons. Below it is a window titled "Developer Console - Google Chrome" showing Apex code in the "CalculateTotalAmountHandler.apxc" tab. The code defines a public class CalculateTotalAmountHandler. It contains a static method calculateTotal that takes lists of new and old Order_Item__c records, and boolean parameters for insert, update, delete, and undelete. The method then collects purchase order IDs affected by changes in Order_Item__c records and handles insert, update, and undelete scenarios. The browser window also shows tabs for Logs, Tests, Checkpoints, Query Editor, View State, Progress, and Problems, with the Problems tab selected. The status bar at the bottom shows weather (31°C Windy), system icons, and the date/time (06-09-2025).

```
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 item : newItems) {
                parentIds.add(item.getOrderId());
            }
            for (Order_Item__c item : oldItems) {
                parentIds.add(item.getOrderId());
            }
        }
    }
}
```

Testing the Code

Developer Console - Google Chrome
 educationcom319-dev-ed.develop.my.salesforce.com/_ui/common/apex/debug/ApexCSPage

File ▾ Edit ▾ Debug ▾ Test ▾ Workspace ▾ Help ▾ < >

CalculateTotalAmountTrigger.apcxt CalculateTotalAmountHandler.apcxt

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 isUpdate, Boolean isDelete)
8
9
10
11   // Collect Purchase Order IDs affected by changes in Order_Item__c records
12
13   Set<Id> parentIds = new Set<Id>();
14
15
16
17   // For insert, update, and undelete scenarios
18
19   if (isInsert || isUpdate || isUndelete) {
20

```

Logs Tests Checkpoints Query Editor View State Progress Problems

Status	Test Run	Enqueued Time	Duration	Failures	Total	Overall Code Coverage
✓	707dM00000mRTX8	Sat Sep 06 2025 18:24:38 GMT...		0	17	Class Overall Overall 0% CalculateTotalAmountHandler 0% 0/22 CalculateTotalAmountTrigger 0% 0/1

31°C Windy Search 06:24 ENG IN 06-09-2025

Create a Purchase Order Based on Supplier Reports

educationcom319-dev-ed.develop.lightning.force.com/lightning/r/Report/00OdM00000ID1FGUA1/view?queryScope=userFolders

Medical Inventory ... Products ▾ Purchase Orders ▾ Order Items ▾ Inventory Transactions ▾ Suppliers ▾ Reports ▾ Dashboards ▾ Setup

Report: Purchase Orders
Purchase Orders based on Suppliers

Total Records: 0 Total Order Count: 0 Total Total Order Cost: ₹0.00

No Results

No records returned. Try editing report filters.

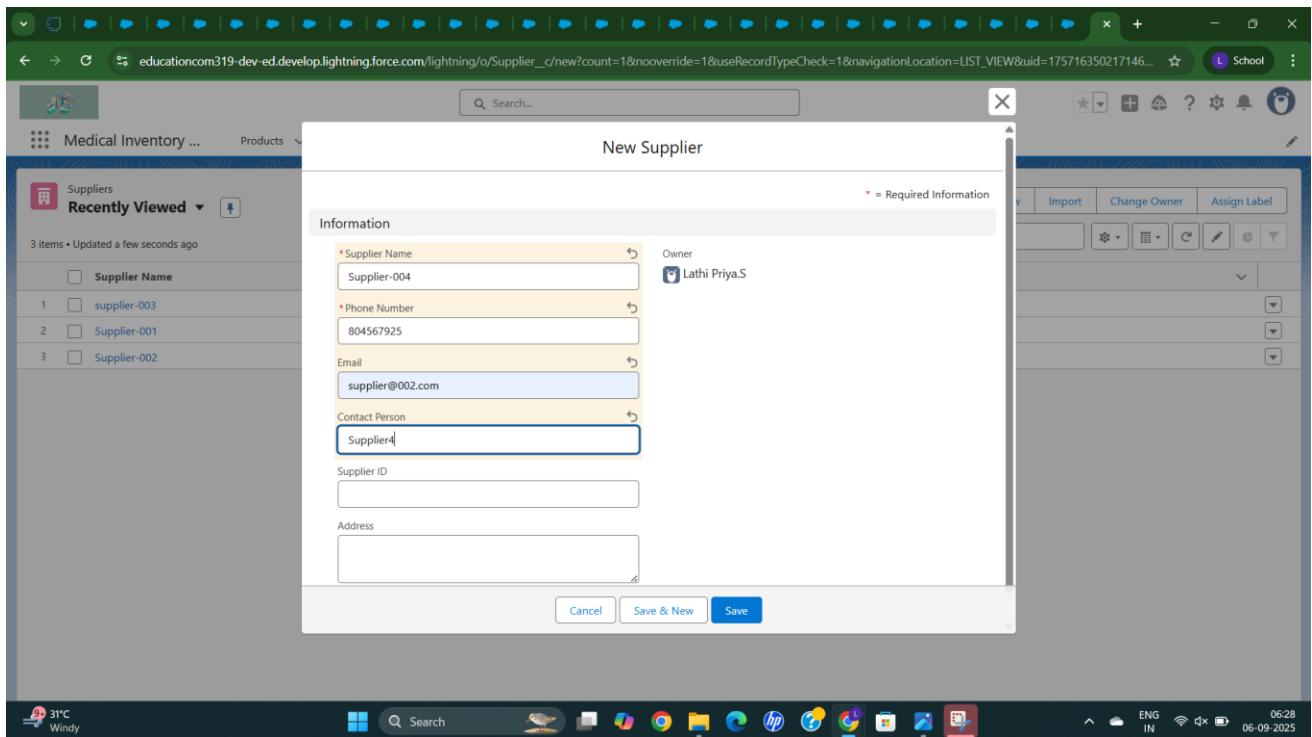
javascript:void(0); Detail Rows Subtotals Grand Total

Trending videos A Big Bold Beau... Search

06:15 ENG IN 06-09-2025

Here its Empty Orders

Now we are creating a Supplier



We have created a Supplier

And then we are adding a purchase Order

In Supplier itself by clicking a Related tab

Supplier
Supplier-001

Related Details

Supplier Name: Supplier-001

Owner: Lathi Priya.S

Phone Number: 1234567890

Email: supplier@001.com

Contact Person: Supplier

Supplier ID: 1234

Address:

Created By: Lathi Priya.S, 06/09/2025, 4:38 pm

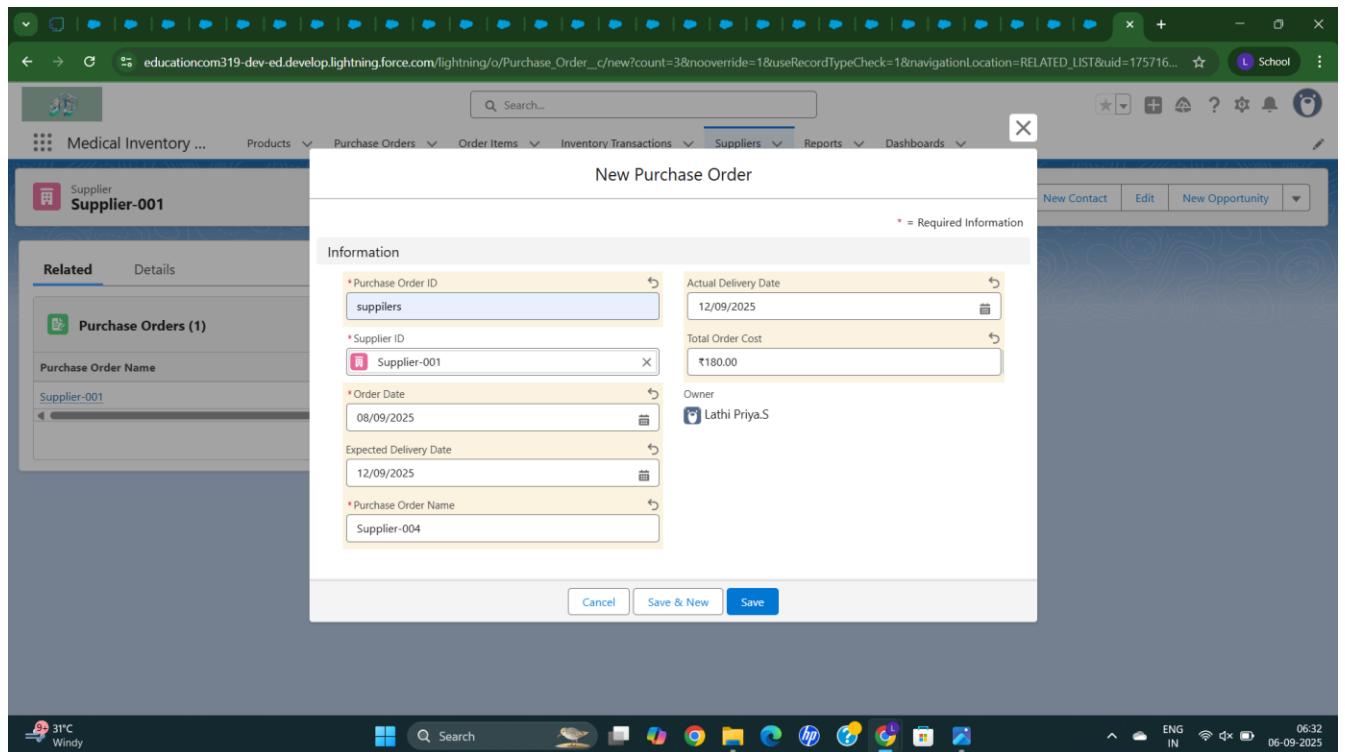
Last Modified By: Lathi Priya.S, 06/09/2025, 4:38 pm

Purchase Orders (1)

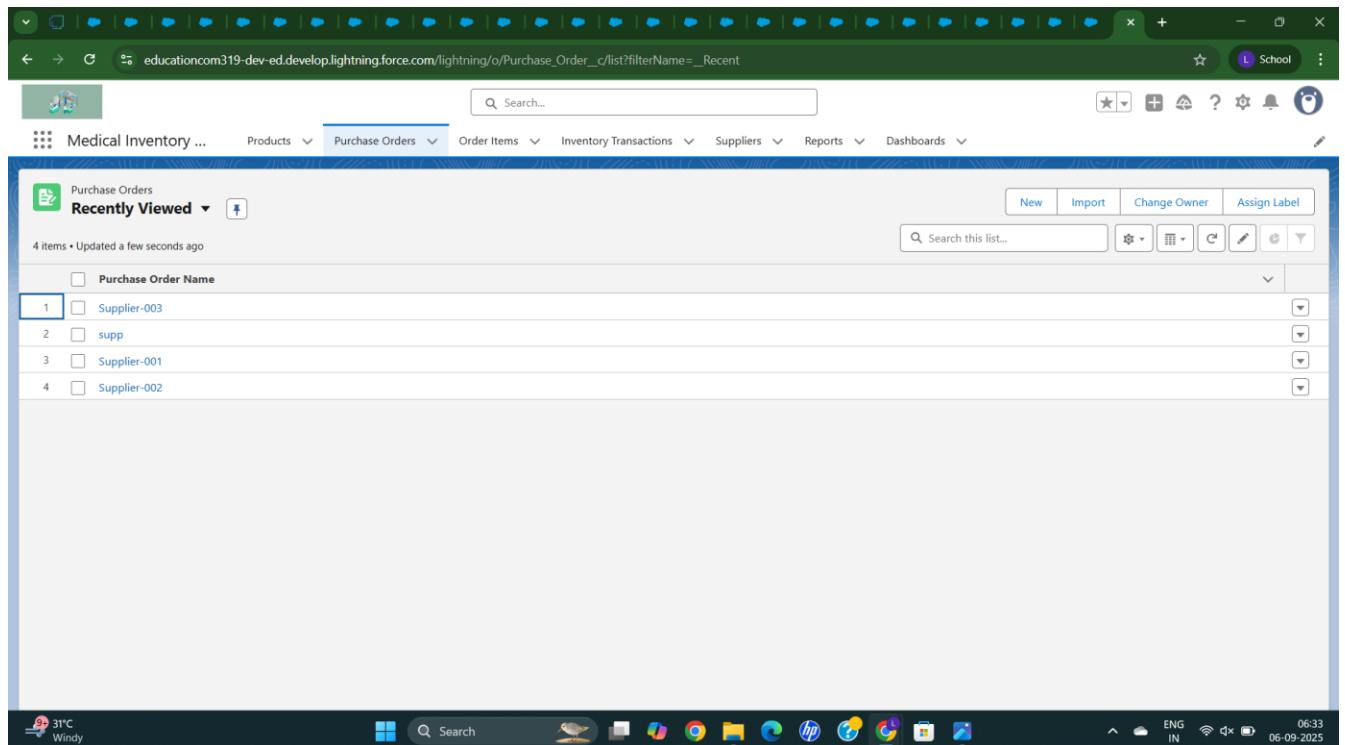
Purchase Order Name: Supplier-001

New

We have created one purchase Order



It is displayed in Purchase Order



In Reports it displaying the orders

The screenshot shows a report titled "Purchase Orders based on Suppliers". The report displays the following data:

Supplier ID	Purchase Order: ID	Total Order Cost
Supplier-001 (1)	a06dm00000EhhG9 (1)	₹560.00
	Subtotal	₹560.00
Supplier-002 (1)	a06dm00000EhhOD (1)	₹3,250.00
	Subtotal	₹3,250.00
Supplier-003 (2)	a06dm00000Ehcww (1)	₹160.00
	Subtotal	₹160.00
	a06dm00000EhiXB (1)	₹0.00
	Subtotal	₹0.00
	Subtotal	₹160.00
	Total (4)	₹3,970.00

Row Counts: ✓ Detail Rows: ✓ Subtotals: ✓ Grand Total: ✓

I have order the item as para

The screenshot shows a list of Order Items under the heading "Recently Viewed". The list contains one item:

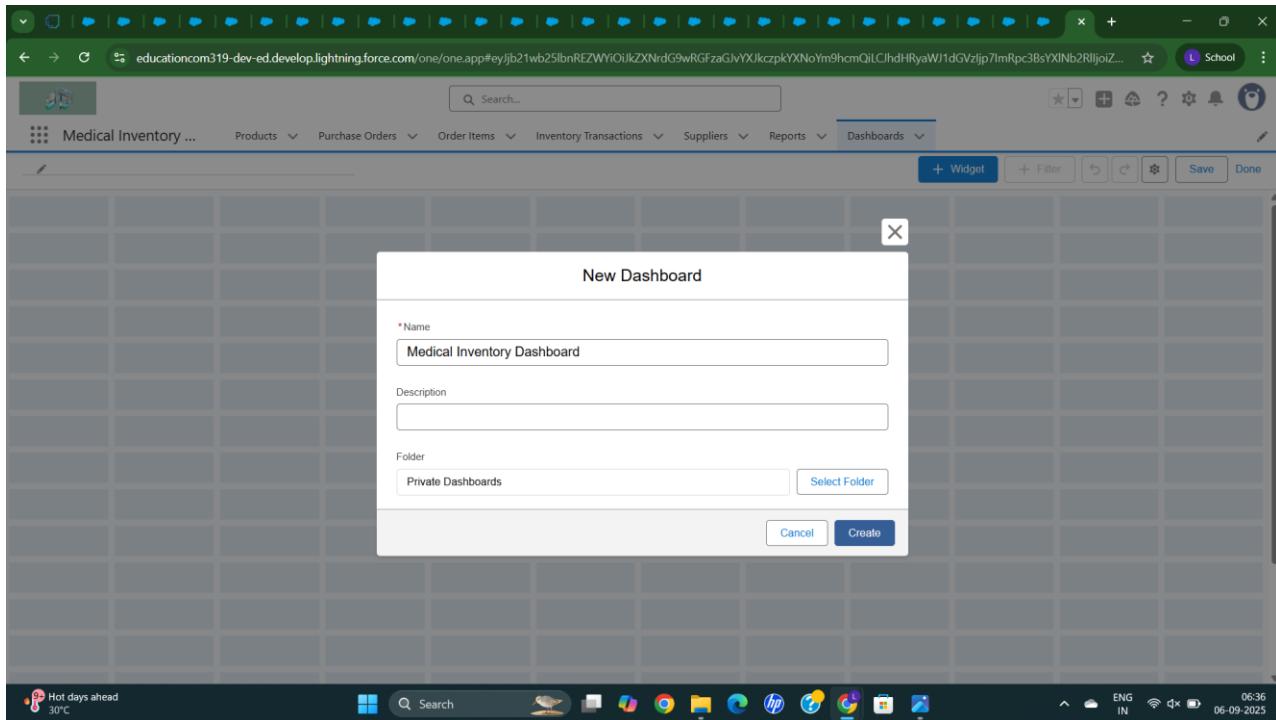
Order Item Name
1 para

1 item • Updated a few seconds ago

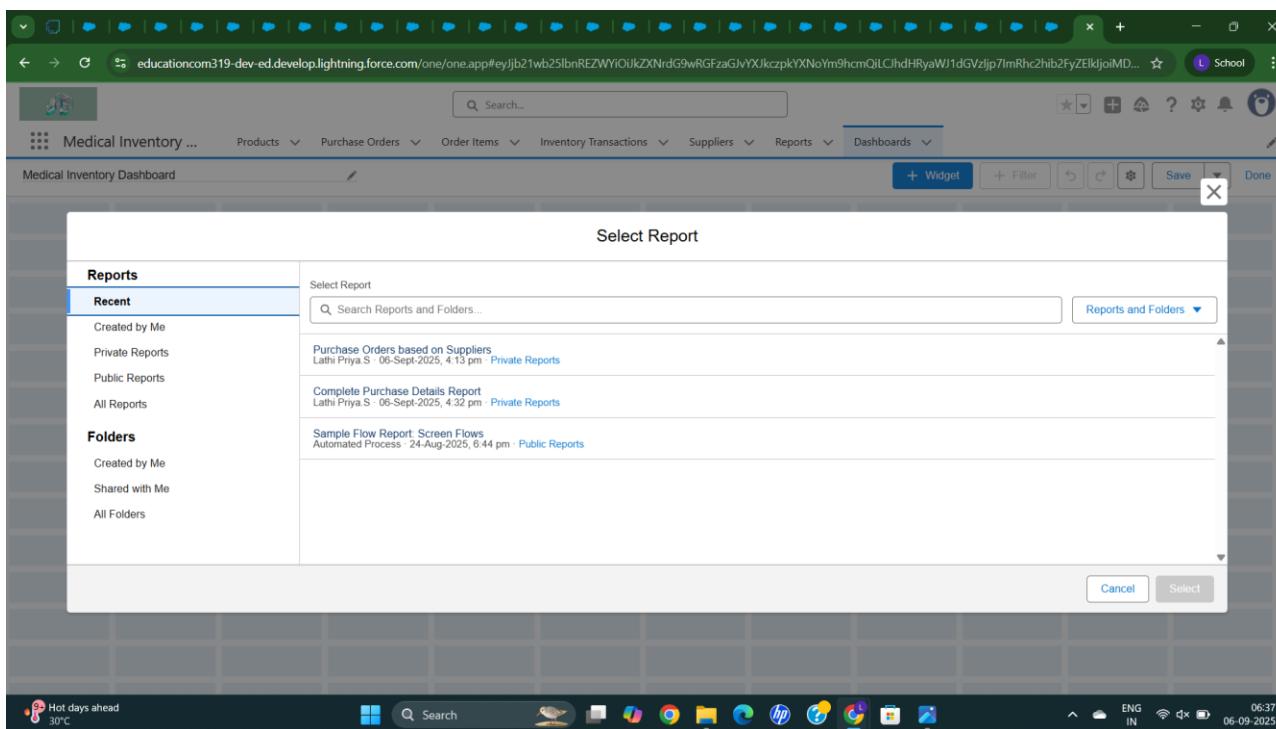
Search this list... New Import Assign Label

Hot days ahead 30°C

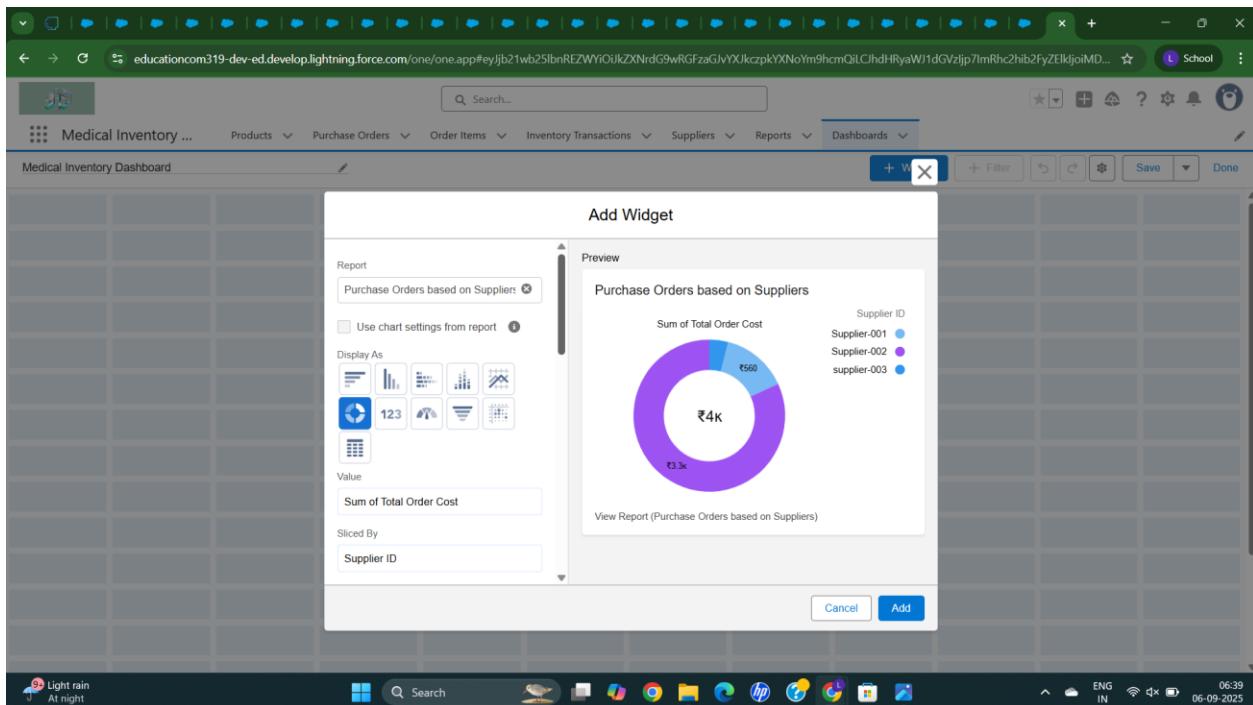
Creating a Dashboard



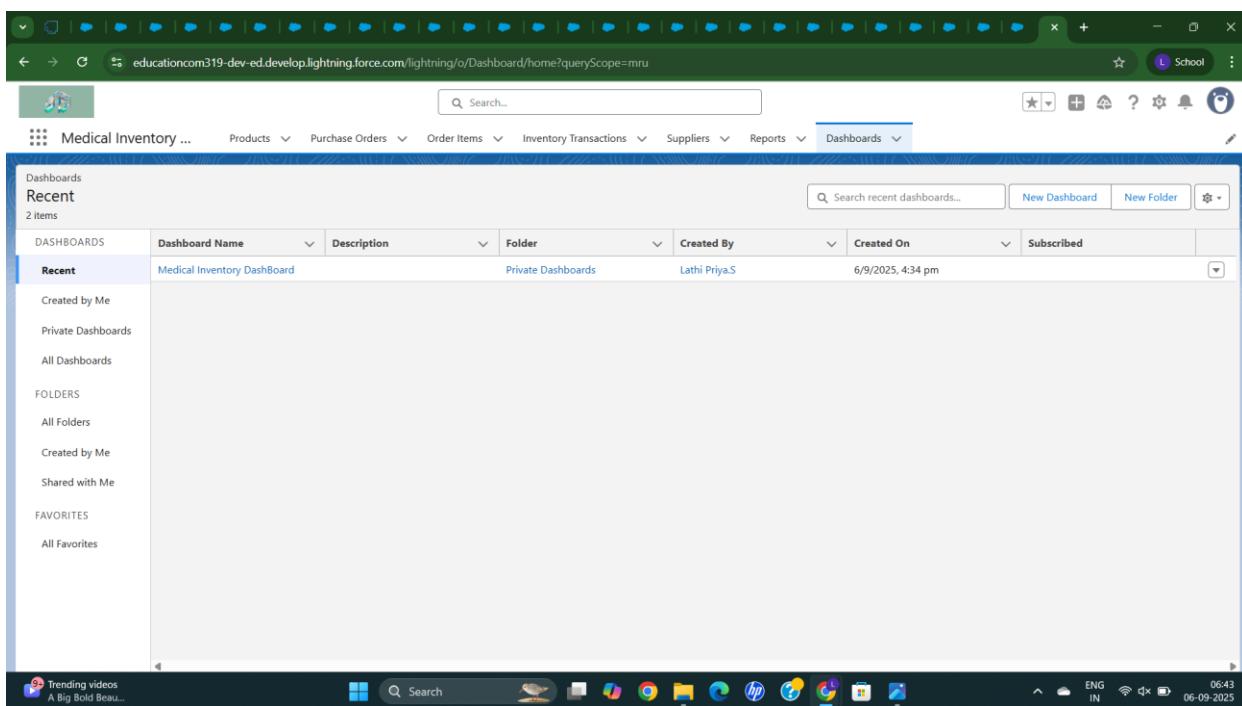
Now we are choosing the Widgets



Now Choosing a Charts to display



The dashboard is created as Medical Inventory DashBoard



The Chart that we created for this Dashboard

Medical Inventory DashBoard

Purchase Orders based on Suppliers

Sum of Total Order Cost

Supplier ID

- Supplier-001
- Supplier-002
- supplier-003

₹4K

₹560

₹3.3k

View Report (Purchase Orders based on Suppliers)

Dashboard saved

+ Widget + Filter Save Done

34°C Mostly sunny

ENG IN 05:02 06-09-2025

These are the items purchased

Report Purchase Orders

Purchase Orders based on Suppliers

Total Records	Total Total Order Cost	
4	₹3,970.00	
Supplier ID	Purchase Order ID	Total Order Cost
Supplier-001 (1)	a08dm00000EhhG9 (1)	₹560.00
	Subtotal	₹560.00
Subtotal		₹560.00
Supplier-002 (1)	a08dm00000EhhOD (1)	₹3,250.00
	Subtotal	₹3,250.00
Subtotal		₹3,250.00
supplier-003 (2)	a08dm00000Ehcwv (1)	₹160.00
	Subtotal	₹160.00
	a08dm00000EhiXB (1)	₹0.00
	Subtotal	₹0.00
Subtotal		₹160.00
Total (4)		₹3,970.00

Enable Field Editing

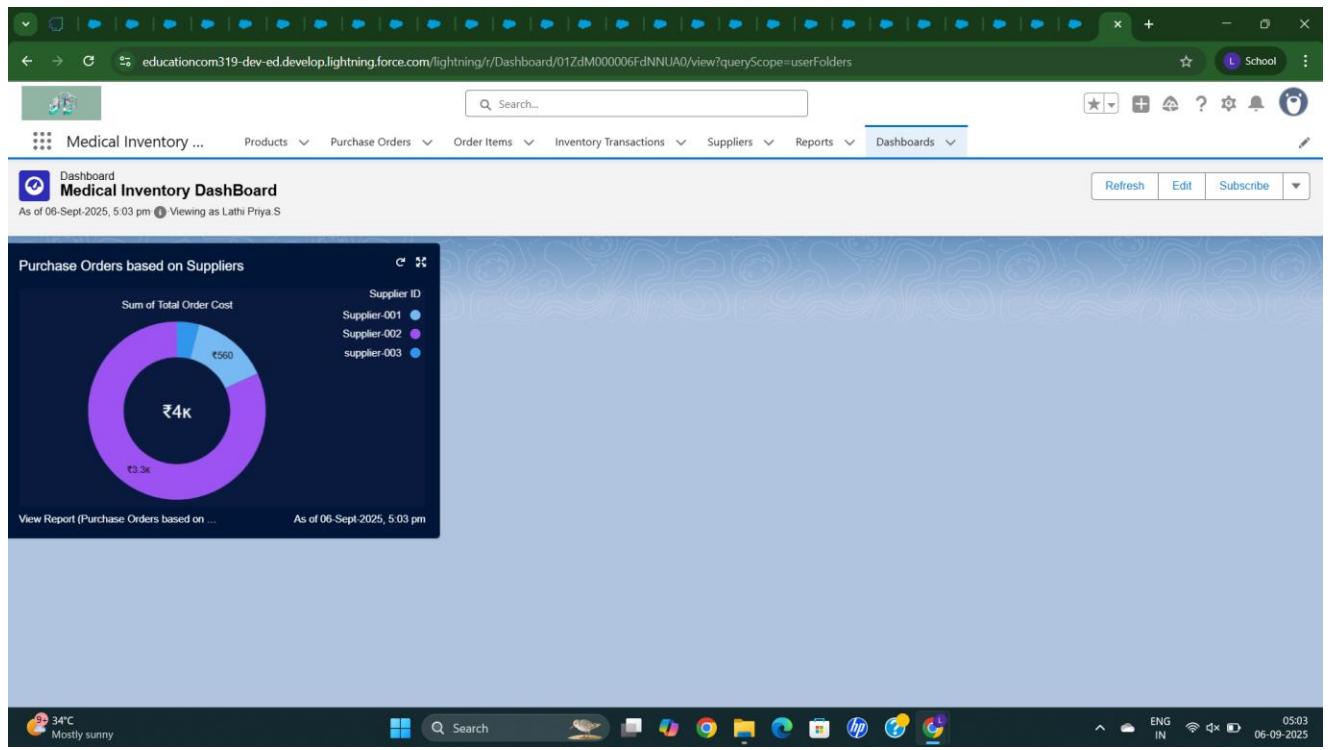
Add Chart

Row Counts Detail Rows Subtotals Grand Total

34°C Mostly sunny

ENG IN 05:02 06-09-2025

Now purchased item will display in dashboard



CONCLUSION:

The Medical Inventory Management each milestone contributes to enhancing the system's efficiency and usability — Starting from account creation to building objects, fields, and layouts, and then moving towards automation with flows and triggers, the app is now well-structured, secure with proper profiles and roles, and provides clear insights through reports and dashboards. This ensures that the end-user gets a simple, efficient, and reliable system to manage their requirements effectively.

APPENDIX

Triggers Class :

CalculateTotalAmountTrigger.apxt

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);
```

```
}
```

APEX CLASS:

CalculateTotalAmountHandler.apxc

```
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;  
  
}  
  
}
```