PROJECT TITLE :

MEDICAL INVENTORY MANAGEMENT

COLLEGE NAME : SUGUNA COLLEGE OF ARTS AND SCIENCE

COLLEGE CODE : brubk

TEAM ID : NM2025TMID27035

TEAM MEMBERS

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1.INTRODUCTION :

The Medical Inventory Management application is built on Salesforce to efficiently manage medical products, suppliers, stock levels, and distribution. It helps healthcare providers, pharmacies, and hospitals track inventory, avoid shortages, and ensure the availability of critical medical supplies.

1.2 PURPOSE :

The purpose of this project is to digitize and streamline the management of medical inventory using Salesforce.

Healthcare providers, hospitals, and pharmacies often face challenges such as:

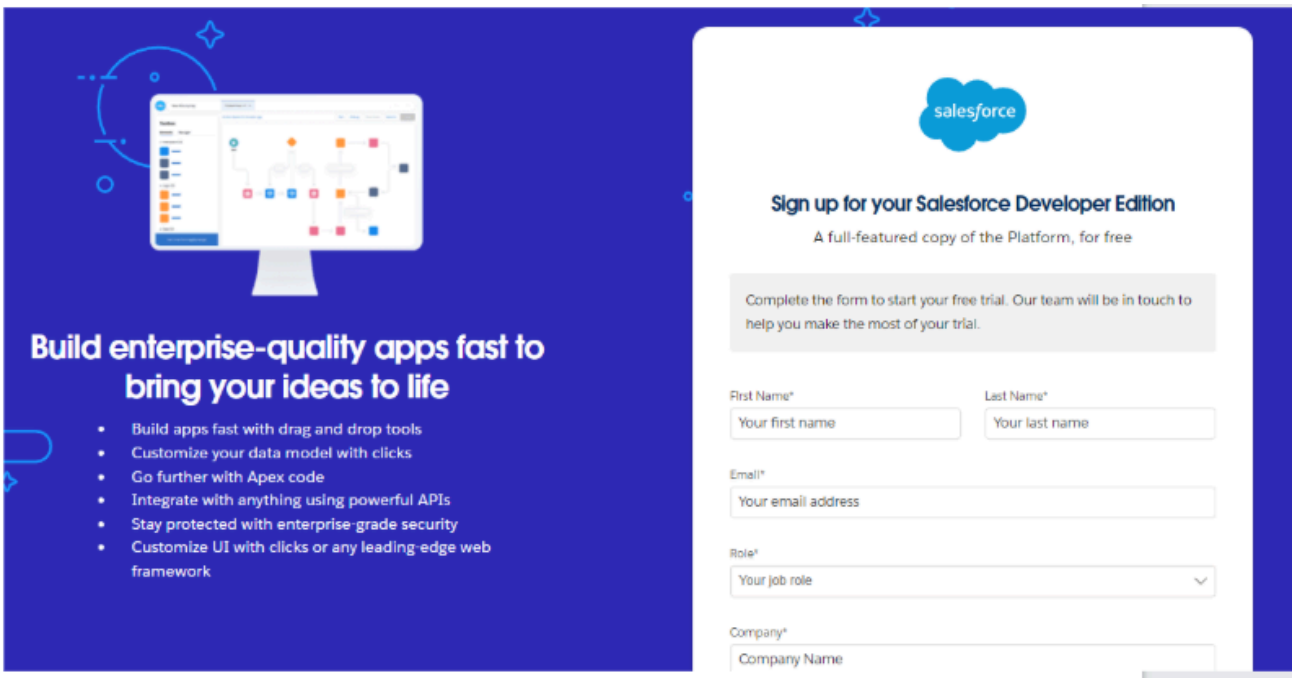
- **Overstocking or shortages of medicines and equipment.**
- **Difficulty in tracking expiry dates of medical products.**
- **Inefficient supplier coordination.**
- **Manual errors in purchase and sales records.**

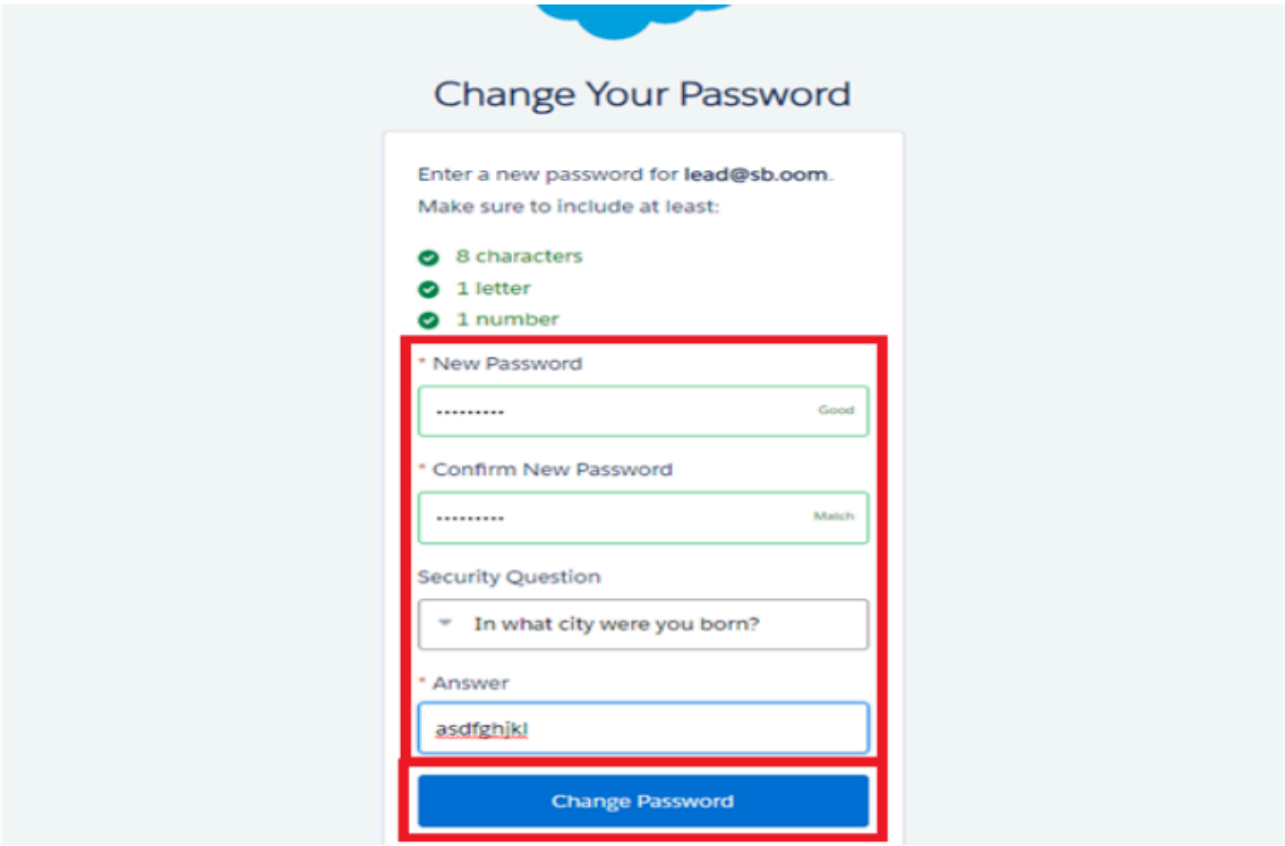
DEVELOPMENT PHASE :

Creating Developer Account: By using this URL -

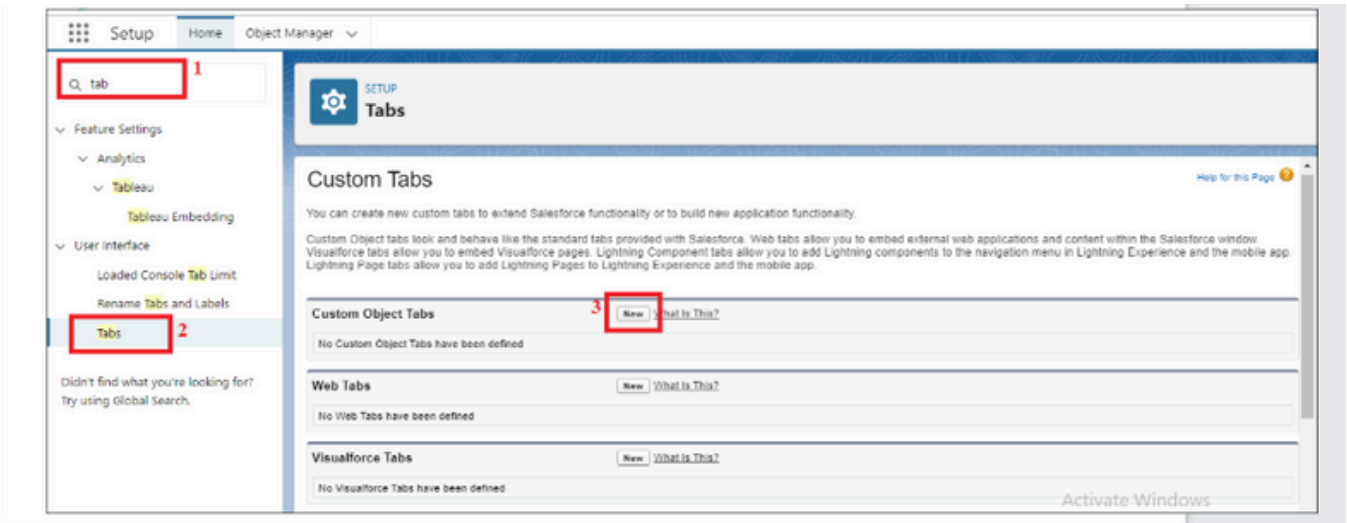
https://www.salesforce.com/form/developer-signup/?d=pd

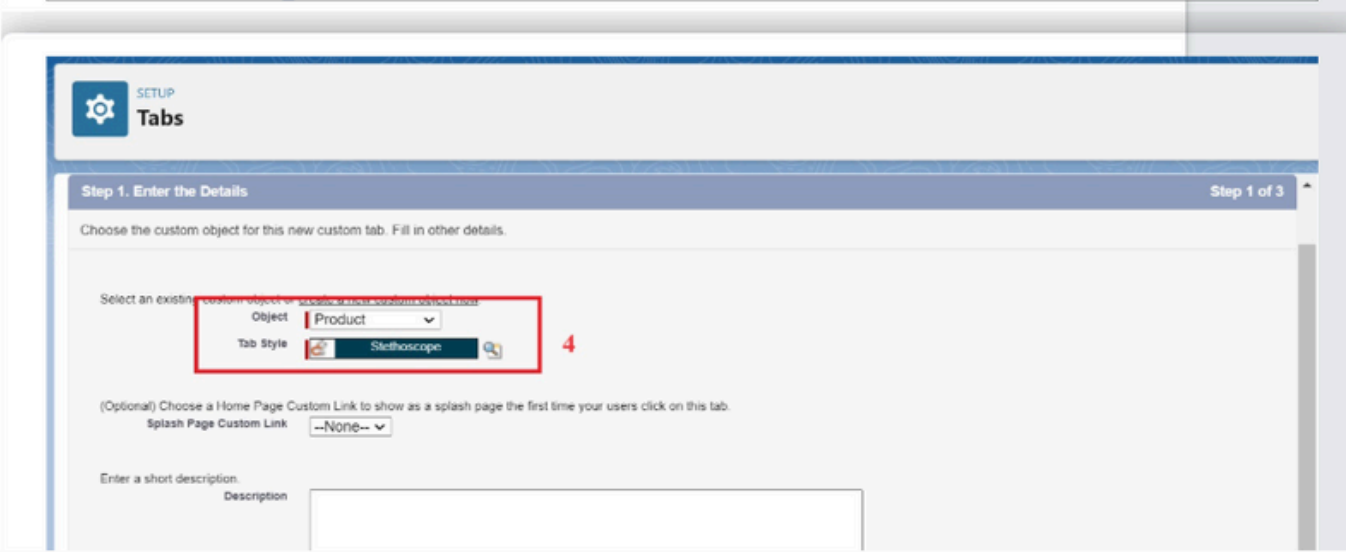
LOG IN TO SALESFORCE DEVELOPER EDITION :

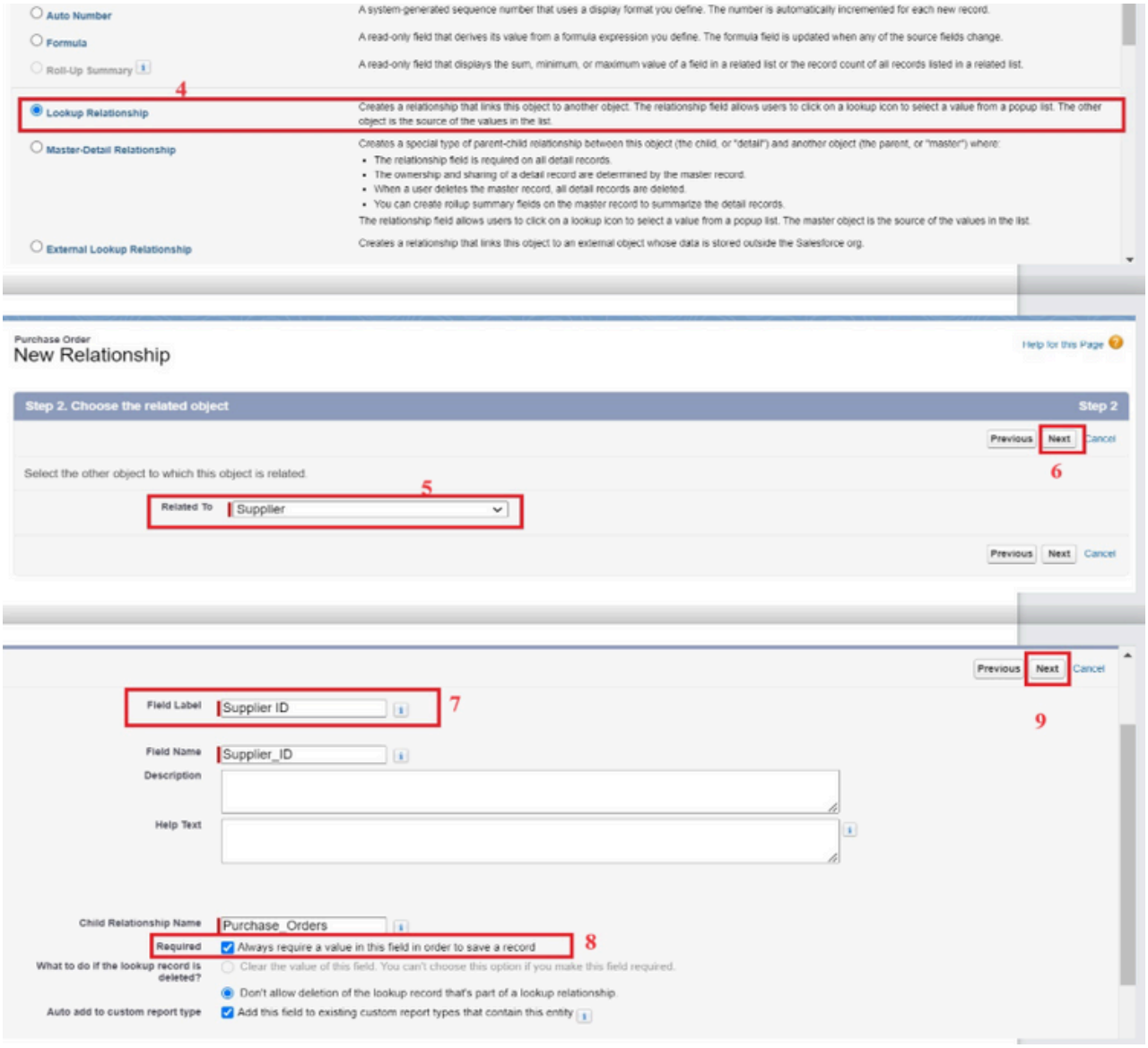




CREATE A CUSTOM TABS :






Auto Number
A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.
Formula
A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.
Roll-Up Summary
A read-only field that displays 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.
4
Lookup Relationship
Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.
Master-Detail Relationship
Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where:
The relationship field is required on all detail records.
The ownership and sharing of a detail record are determined by the master record.
When a user deletes the master record, all detail records are deleted.
You can create rollup summary fields on the master record to summarize the detail records.
The relationship field allows 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.
External Lookup Relationship
Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.
Purchase Order
New Relationship
Help for this Page
Step 2. Choose the related object
Step 2
Previous
Next
Cancel
6
Select the other object to which this object is related.
5
Related To
Supplier
Previous
Next
Cancel
Previous
Next
Cancel
9
Field Label
Supplier ID
7
Field Name
Supplier_ID
Description
Help Text
Child Relationship Name
Purchase_Orders
Required
Always require a value in this field in order to save a record
8
What to do if the lookup record is deleted?
Clear the value of this field. You can't choose this option if you make this field required.
Don't allow deletion of the lookup record that's part of a lookup relationship.
Auto add to custom report type
Add this field to existing custom report types that contain this entity

Field Label: Unit Price 5

Field Name: Unit_Price

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

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.

Order Item

New Custom Field

Help for this Page

Step 3. Enter formula — 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...

Quick Tips 8
- Getting Started
- Operators & Functions

Simple Formula | Advanced Formula

Insert Field | Insert Operator

Unit Price (Currency) =

Product_ID__r.Unit_Price__c 7

Functions: -- All Function Categories --

ABS
ACOS
ADDMONTHS
AND
ASCII
ASIN

Insert Selected Function

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

Geolocation	Allows users to define locations. Includes latitude and longitude components, and can be used to calculate distance.
Number	Allows users to enter any number. Leading zeros are removed.
Percent	Allows users to enter a percentage number, for example, "10" and automatically adds the percent sign to the number.
Phone	Allows users to enter any phone number. Automatically formats it as a phone number.
Picklist	Allows users to select a value from a list you define.
Picklist (Multi-Select)	Allows users to select multiple values from a list you define.
Text	Allows users to enter any combination of letters and numbers.
Text Area	Allows users to enter up to 255 characters on separate lines.
Text Area (Long)	Allows users to enter up to 131,072 characters on separate lines.
Text Area (Rich)	Allows users to enter formatted text, add images and links. Up to 131,072 characters on separate lines.
Text (Encrypted)	Allows users to enter any combination of letters and numbers and store them in encrypted form.
Time	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.
URL	Allows users to enter any valid website address. When users click on the field, the URL will open in a separate browser window.

6

Next Cancel

Step 2. Enter the details

Step 2 of 4

Previous Next Cancel

8

Field Label: Product Description 7

Field Name: Product_Description

Description:

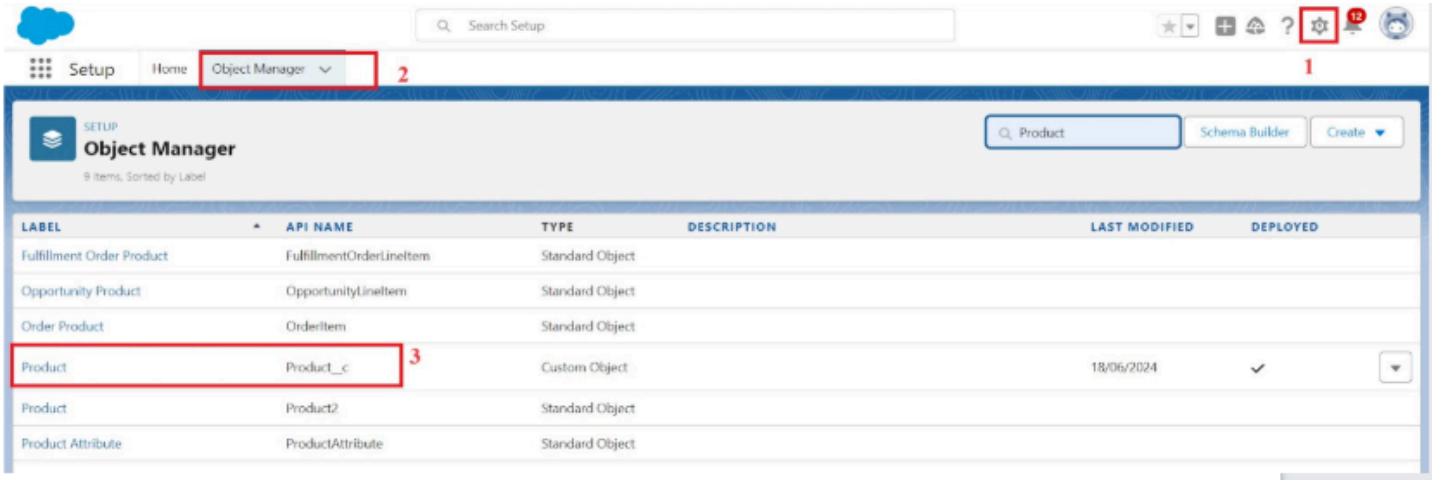
Help Text:

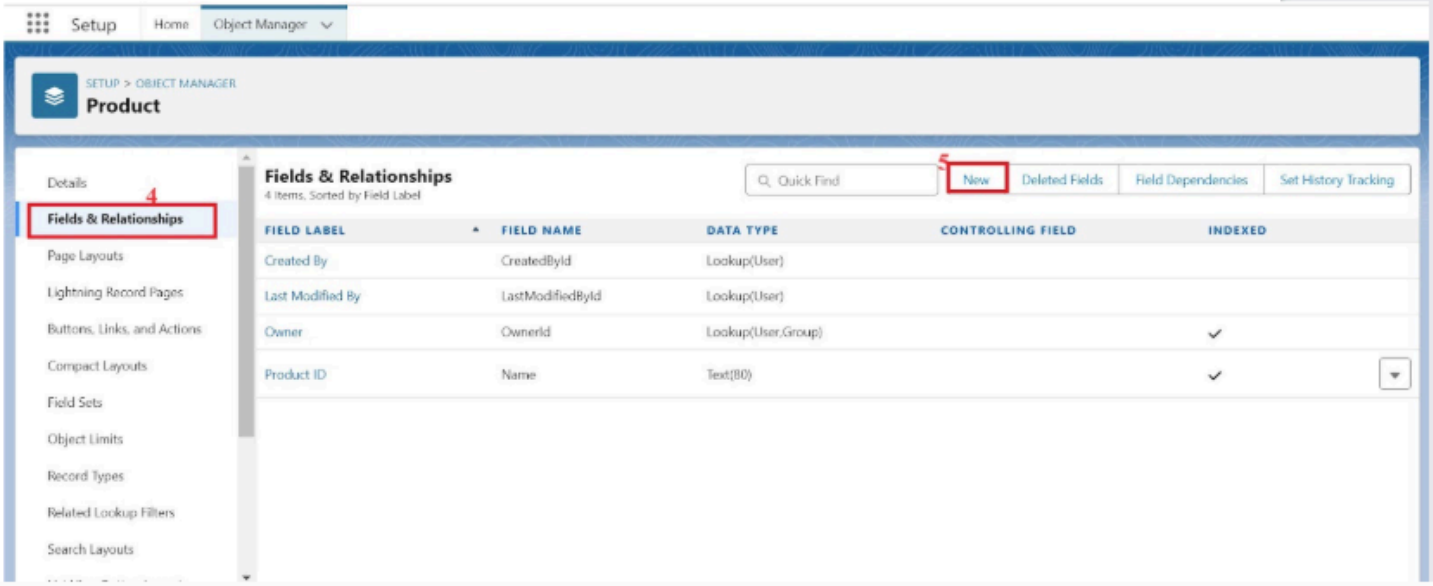
Required: Always require a value in this field in order to save a record

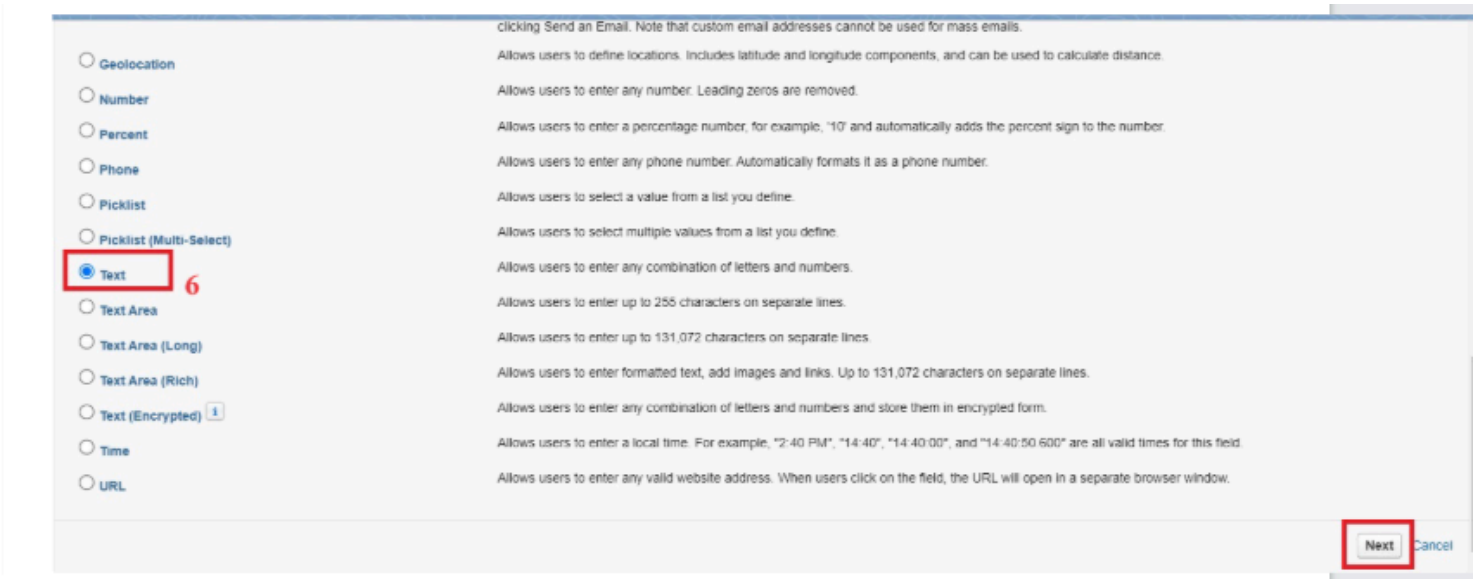
Auto add to custom report type: Add this field to existing custom report types that contain this entity

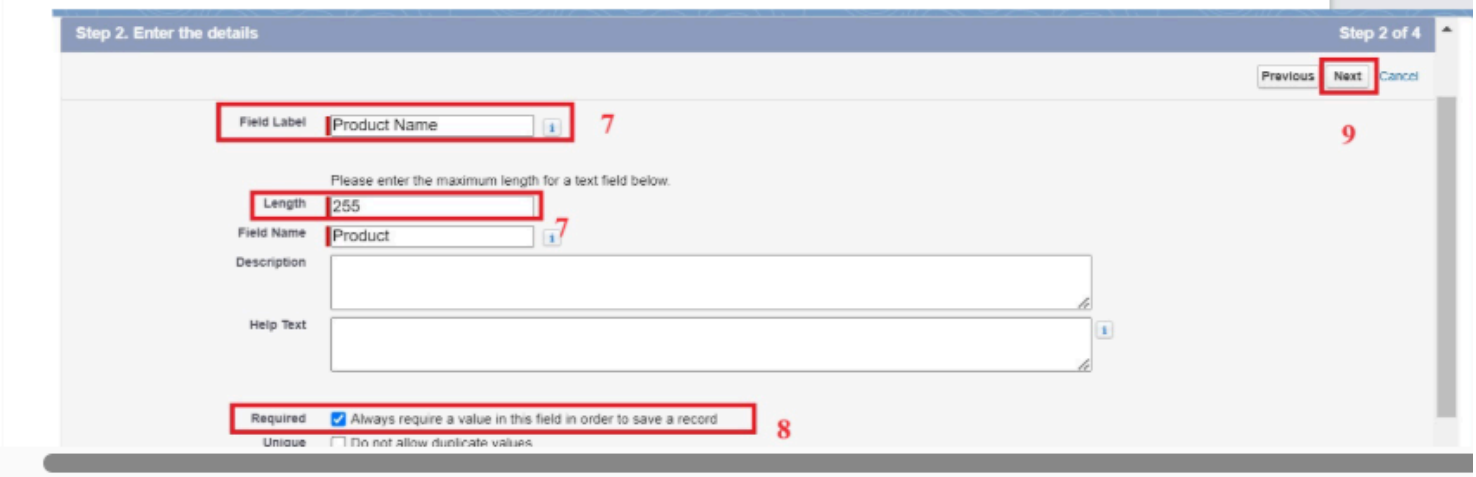
Default Value: Show Formula Editor

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


Search Setup
Setup
Home
Object Manager
2
1
SETUP
Object Manager
9 items, Sorted by Label
Product
Schema Builder
Create
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
3
Custom Object
18/06/2024
Product
Product2
Standard Object
Product Attribute
ProductAttribute
Standard Object


Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Product
Details
4
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
Fields & Relationships
4 items, Sorted by Field Label
Quick Find
5
New
Deleted Fields
Field Dependencies
Set History Tracking
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
Allows users to define locations. Includes latitude and longitude components, and can be used to calculate distance.
Number
Allows users to enter any number. Leading zeros are removed.
Percent
Allows users to enter a percentage number, for example, '10' and automatically adds the percent sign to the number.
Phone
Allows users to enter any phone number. Automatically formats it as a phone number.
Picklist
Allows users to select a value from a list you define.
Picklist (Multi-Select)
Allows users to select multiple values from a list you define.
Text
6
Allows users to enter any combination of letters and numbers.
Text Area
Allows users to enter up to 255 characters on separate lines.
Text Area (Long)
Allows users to enter up to 131,072 characters on separate lines.
Text Area (Rich)
Allows users to enter formatted text, add images and links. Up to 131,072 characters on separate lines.
Text (Encrypted)
Allows users to enter any combination of letters and numbers and store them in encrypted form.
Time
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.
URL
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
7
9
Please enter the maximum length for a text field below.
Length
255
Field Name
Product
7
Description
Help Text
Required
Always require a value in this field in order to save a record
8
Unique
Do not allow duplicate values

Previous Next Cancel

Field Label: Order Count 5

Field Name: Order_Count

Description:

Help Text:

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

Previous Next Cancel

Purchase Order

New Custom Field

Help for this Page

Step 3. Define the summary calculation — Step 3 of 5

Previous Next Cancel

Select Object to Summarize — 8 Required Information

Master Object: Purchase Order

Summarized Object: Order Items 6

Select Roll-Up Type

COUNT 7

SUM

MIN

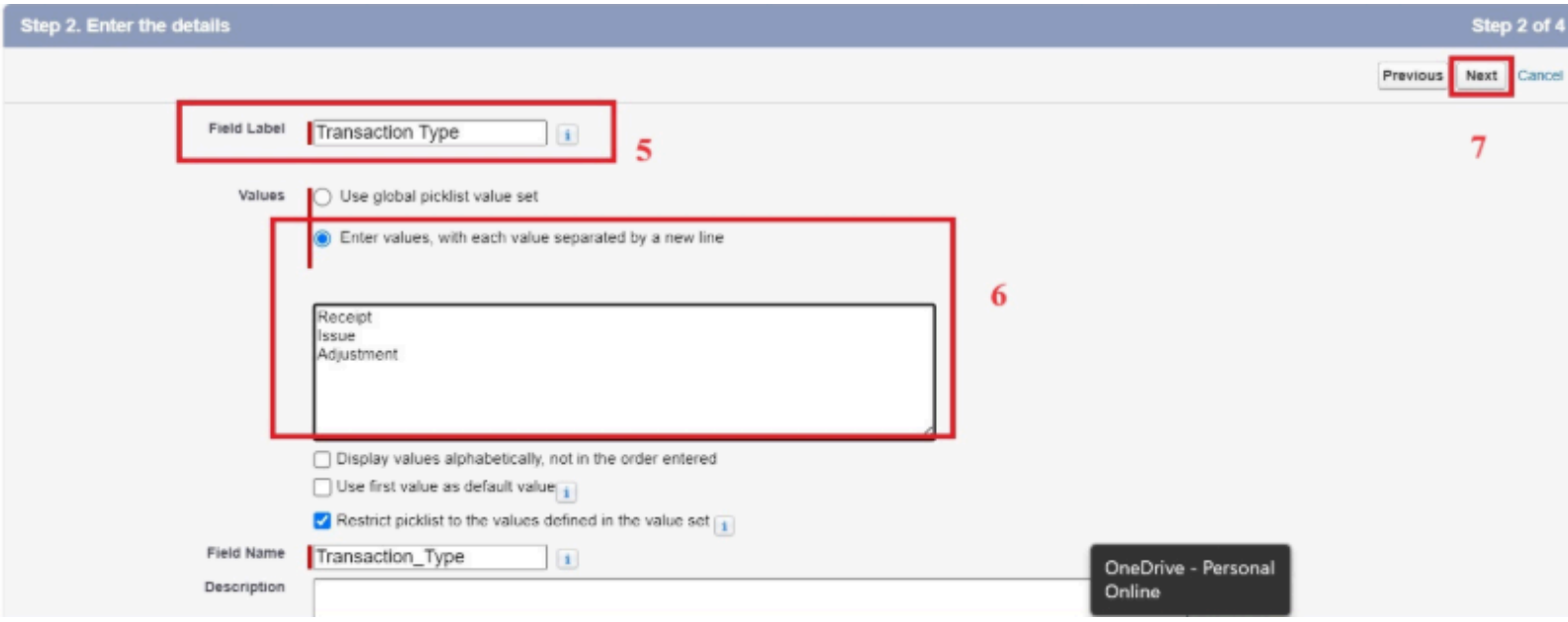
MAX

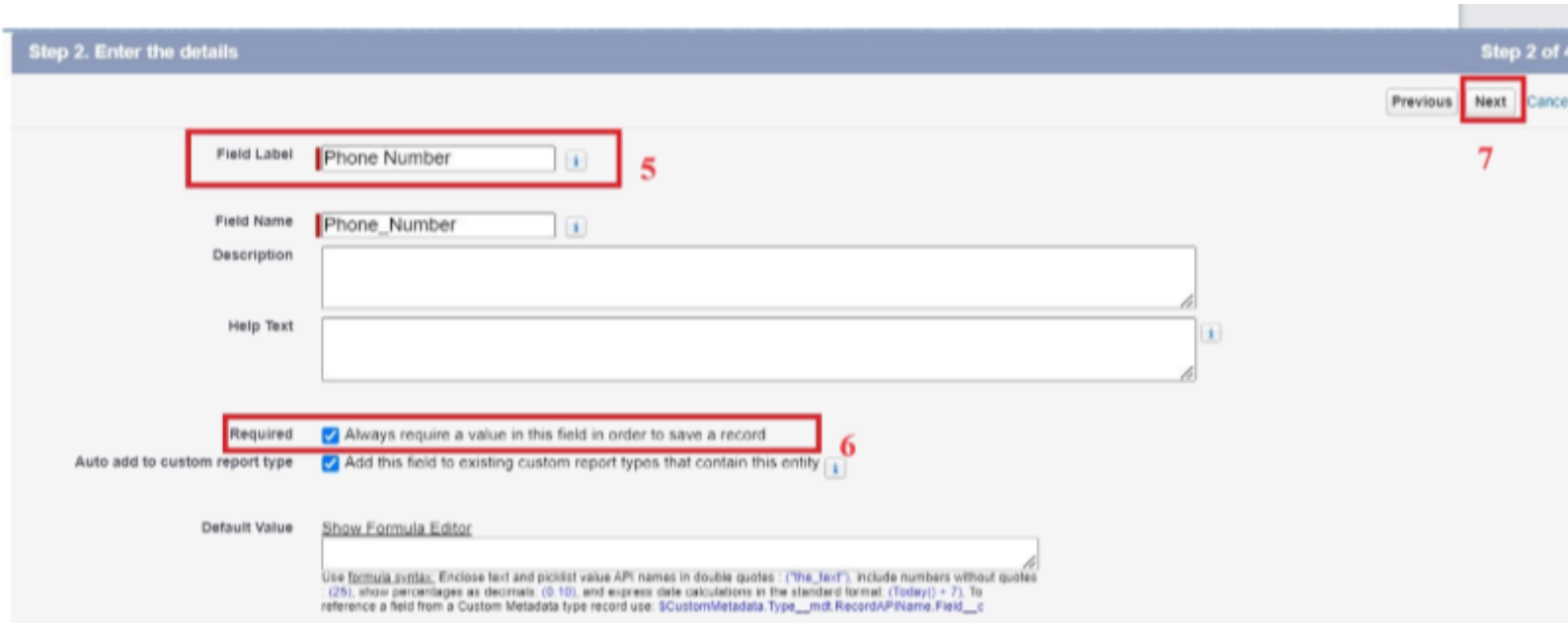
Field to Aggregate: --None--

Filter Criteria

All records should be included in the calculation

Only records meeting certain criteria should be included in the calculation


Step 2. Enter the details
Step 2 of 4
Previous
Next
Cancel
Field Label
Transaction Type
5
7
Values
Use global picklist value set
Enter values, with each value separated by a new line
6
Receipt
Issue
Adjustment
Display values alphabetically, not in the order entered
Use first value as default value
Restrict picklist to the values defined in the value set
Field Name
Transaction_Type
Description
OneDrive - Personal
Online


Step 2. Enter the details
Step 2 of
Previous
Next
Cance
Field Label
Phone Number
5
7
Field Name
Phone_Number
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
Default Value
Show Formula Editor
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

Step 2. Enter the details

Step 2 of 4

Previous Next Cancel

Field Label Current Stock Level 5

7

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

6

Length 18

Number of digits to the left of the decimal point

Decimal Places 0

Number of digits to the right of the decimal point

Field Name Current_Stock_Level

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

Step 2. Enter the details

Step 2 of 4

Previous Next Cancel

Field Label Email

5

6

Field Name Email

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 Show Formula Editor

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

Step 2. Enter the details

Step 2 of 4

Previous Next Cancel

Field Label Order Date 5

6

Field Name Order_Date

Description

Help Text

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

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

Default Value Show Formula Editor

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

New Lightning App

App Details

3 *App Name

Medical Inventory Management

*Developer Name

Medical_Inventory_Management

Description

Enter a description...

App Branding

Image 3

Clear

Primary Color Hex Value

#0070D2

Org Theme Options

Use the app's image and color instead of the org's custom theme

App Launcher Preview

Next

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

Create

Dash

Dashboards

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

system

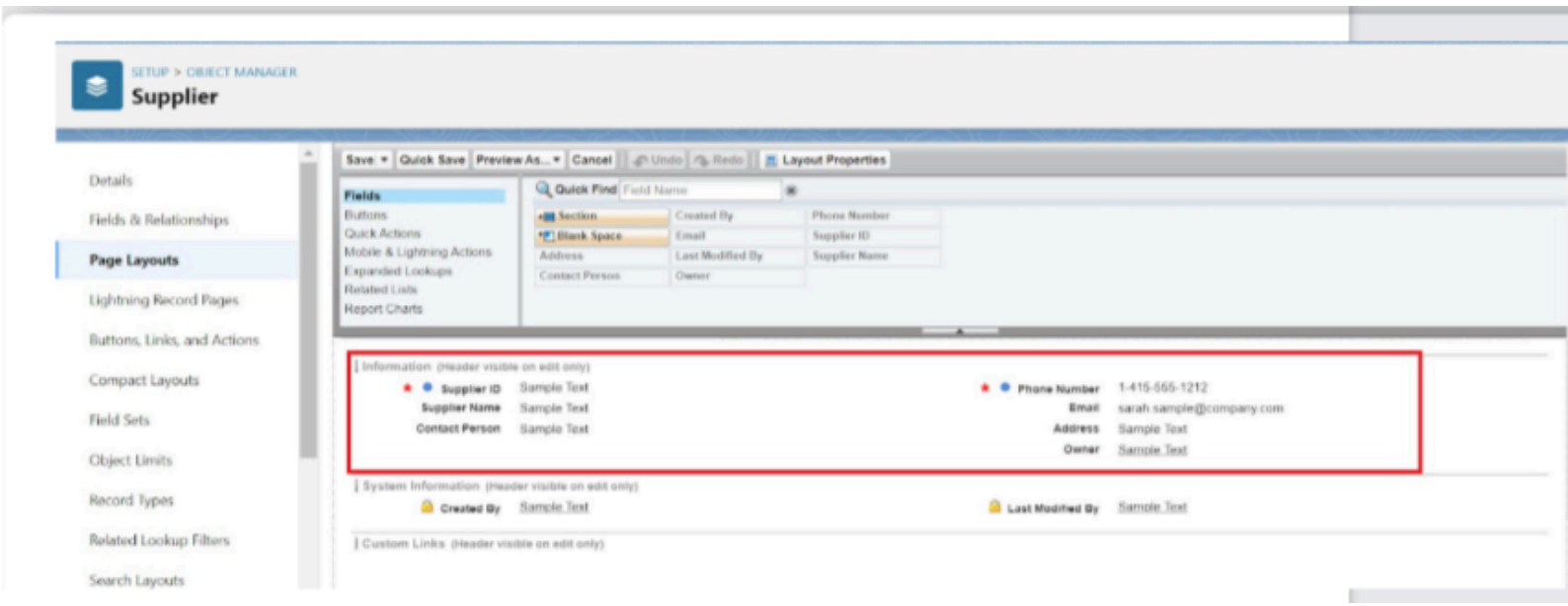
System Administrator

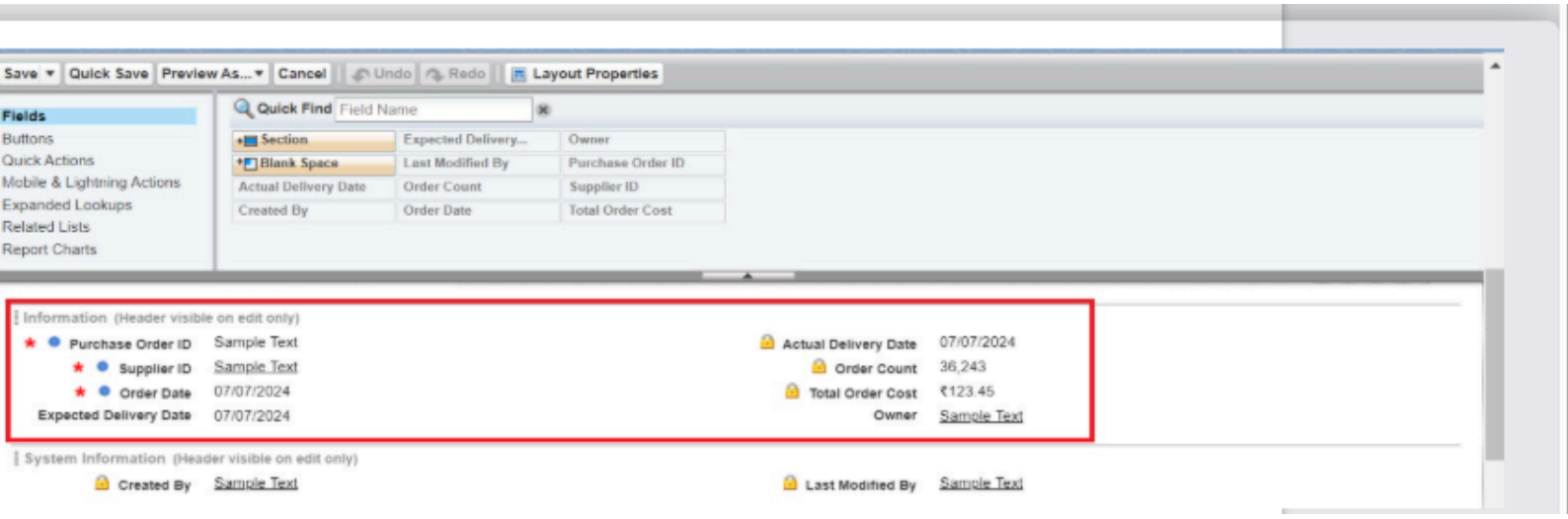
Selected Profiles

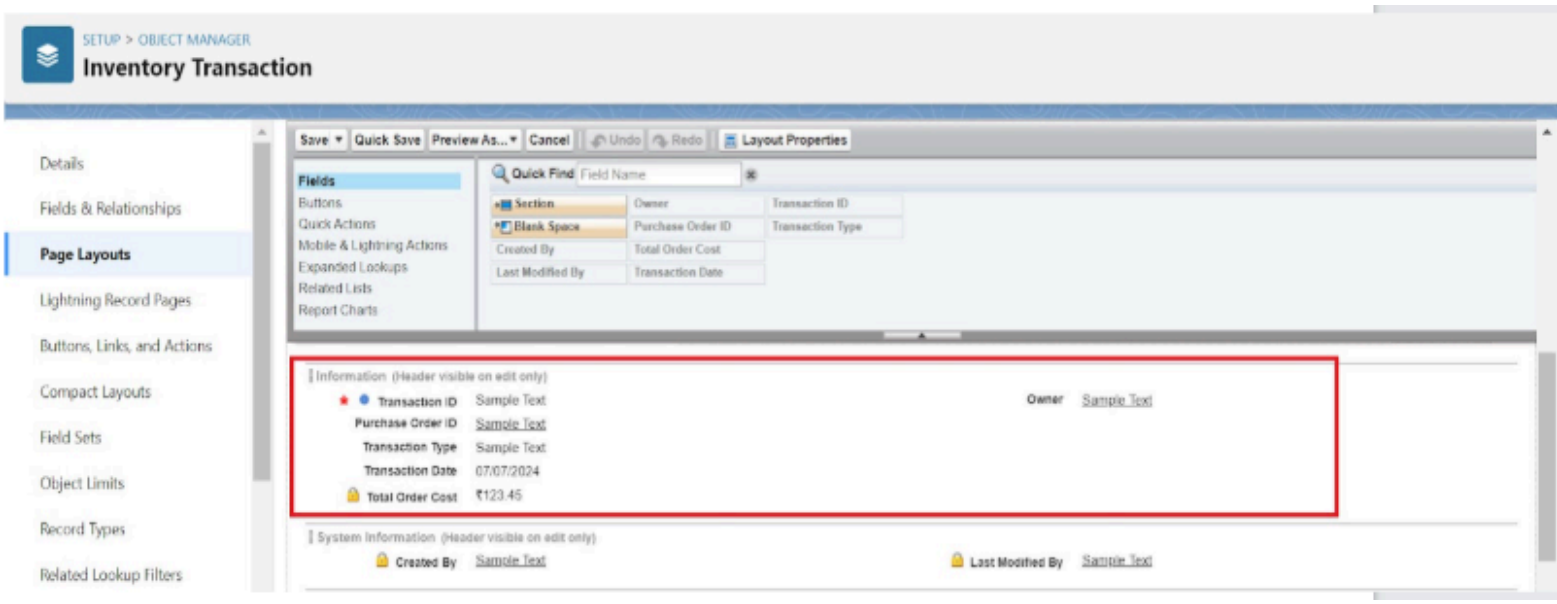
Back

8

Save & Finish


SETUP > OBJECT MANAGER
Supplier
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
Save
Quick Save
Preview As...
Cancel
Undo
Redo
Layout Properties
Fields
Buttons
Quick Actions
Mobile & Lightning Actions
Expanded Lookups
Related Lists
Report Charts
Quick Find
Field Name
Section
Blank Space
Created By
Email
Address
Contact Person
Owner
Phone Number
Supplier ID
Supplier Name
Last Modified By
Information (Header visible on edit only)
Supplier ID
Sample Text
Supplier Name
Sample Text
Contact Person
Sample Text
Phone Number
1-415-555-1212
Email
sarah.sample@company.com
Address
Sample Text
Owner
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)


Save
Quick Save
Preview As...
Cancel
Undo
Redo
Layout Properties
Fields
Buttons
Quick Actions
Mobile & Lightning Actions
Expanded Lookups
Related Lists
Report Charts
Quick Find
Field Name
Section
Blank Space
Expected Delivery...
Owner
Last Modified By
Purchase Order ID
Actual Delivery Date
Order Count
Supplier ID
Created By
Order Date
Total Order Cost
Information (Header visible on edit only)
Purchase Order ID
Sample Text
Supplier ID
Sample Text
Order Date
07/07/2024
Expected Delivery Date
07/07/2024
Actual Delivery Date
07/07/2024
Order Count
36,243
Total Order Cost
₹123.45
Owner
Sample Text
System Information (Header visible on edit only)
Created By
Sample Text
Last Modified By
Sample Text


SETUP > OBJECT MANAGER
Inventory Transaction
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Save
Quick Save
Preview As...
Cancel
Undo
Redo
Layout Properties
Fields
Buttons
Quick Actions
Mobile & Lightning Actions
Expanded Lookups
Related Lists
Report Charts
Quick Find
Field Name
Section
Blank Space
Owner
Transaction ID
Purchase Order ID
Transaction Type
Created By
Total Order Cost
Last Modified By
Transaction Date
Information (Header visible on edit only)
Transaction ID
Sample Text
Purchase Order ID
Sample Text
Transaction Type
Sample Text
Transaction Date
07/07/2024
Total Order Cost
₹123.45
Owner
Sample Text
System Information (Header visible on edit only)
Created By
Sample Text
Last Modified By
Sample Text

Setup | Home | Object Manager

Profiles

Users

Profiles

Didn't find what you're looking for? Try using Global Search.

SETUP
Profiles

Profiles

Help for this Page

All Profiles | Edit | Delete | Create New View

New Profile

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

Action	Profile Name	User License	Custom
Edit | Clone	Salesforce API Only System Integrations	Salesforce Integration	
Edit | Clone	Silver Partner User	Silver Partner	
Edit | Clone	Solution Manager	Salesforce	
Edit | Clone	Standard Platform User	Salesforce Platform	
Edit | Clone	Standard User	Salesforce	
Edit | Clone	System Administrator	Salesforce	

Clone Profile

Enter the name of the new profile.

You must select an existing profile to clone from.

Existing Profile	Standard User
User License	Salesforce
Profile Name	Inventory Manager

Save | Cancel

SETUP
Profiles

Custom App Settings

* Required Information

	Visible	Default
All Tabs (standard__AllTabSet)	☑	○
Analytics Studio (standard__Insights)	☑	○
App Launcher (standard__AppLauncher)	☑	○
Bolt Solutions (standard__LightningBolt)	☑	○
Community (standard__Community)	☑	○
Content (standard__Content)	☑	○
Data Manager (standard__DataManager)	☑	○
Digital Experiences (standard__SalesforceCMS)	☑	○
Lightning Usage App (standard__LightningInstrumentation)	☑	○
Marketing CRM Classic (standard__Marketing)	☑	○
Medical Inventory Management (Medical_Inventory_Management)	☑	◉
Queue Management (standard__QueueManagement)	☑	○

	Visible	Default
Sales (standard__LightningSales)	☑	○
Sales (standard__Sales)	☑	○
Sales Console (standard__LightningSalesConsole)	☑	○
Salesforce Chatter (standard__Chatter)	☑	○
Salesforce Scheduler Setup (standard__LightningScheduler)	☐	○
Sample Console (standard__ServiceConsole)	☐	○
Service (standard__Service)	☑	○
Service Console (standard__LightningService)	☑	○
Site.com (standard__Sites)	☑	○
Subscription Management (standard__RevenueCloudConsole)	☑	○
WDC (standard__Work)	☑	○

Custom Object Permissions

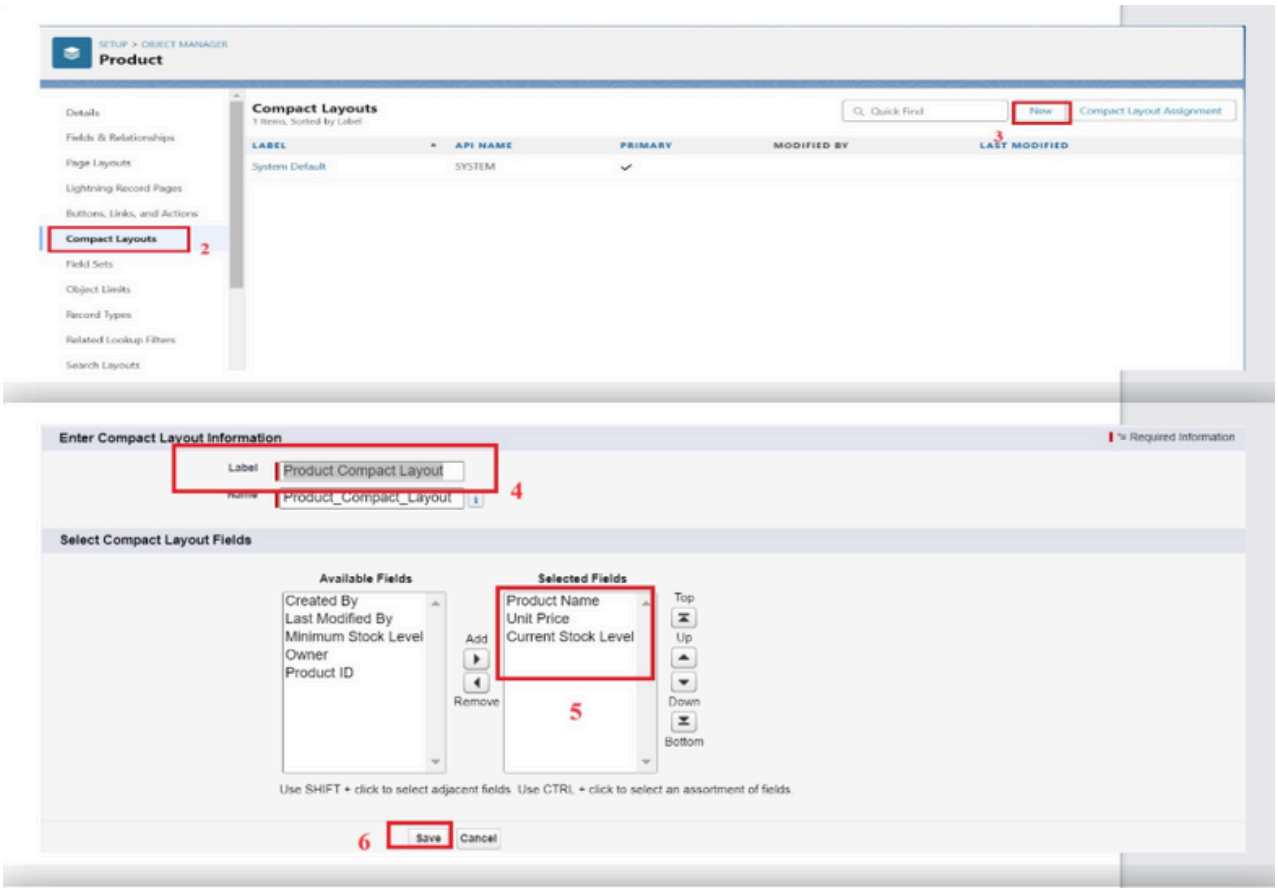
	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
Inventory Transactions	☑	☑	☑	☑	☑	☑
Order Items	☑	☑	☑	☑	☑	☑
Products	☑	☑	☑	☑	☑	☑

	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
Purchase Orders	☑	☑	☑	☑	☑	☑
Suppliers	☑	☑	☑	☑	☑	☑

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	☐

Save | Save & New | Cancel


SETUP > OBJECT MANAGER
Product
Details
Fields & Relationships
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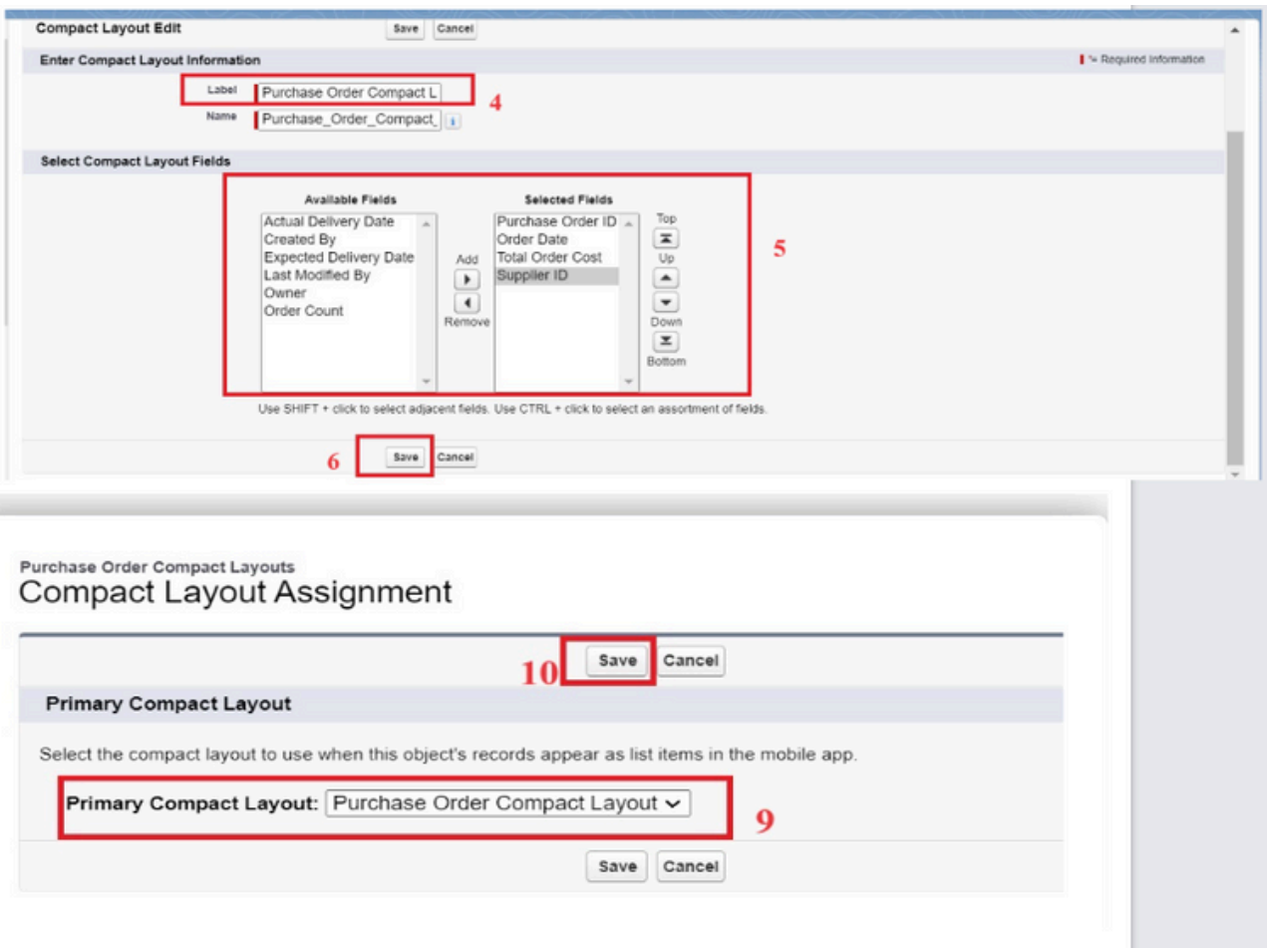
2
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
Compact Layouts
1 Items, Sorted by Label
Quick Find
New
Compact Layout Assignment
3
LABEL
API NAME
PRIMARY
MODIFIED BY
LAST MODIFIED
System Default
SYSTEM
Enter Compact Layout Information
Required Information
Label
Product Compact Layout
Name
Product_Compact_Layout
4
Select Compact Layout Fields
Available Fields
Selected Fields
Created By
Last Modified By
Minimum Stock Level
Owner
Product ID
Add
Remove
Product Name
Unit Price
Current Stock Level
5
Top
Up
Down
Bottom
Use SHIFT + click to select adjacent fields. Use CTRL + click to select an assortment of fields.
6
Save
Cancel


Compact Layout Edit
Save
Cancel
Enter Compact Layout Information
Required Information
Label
Purchase Order Compact L
Name
Purchase_Order_Compact_
4
Select Compact Layout Fields
Available Fields
Selected Fields
Actual Delivery Date
Created By
Expected Delivery Date
Last Modified By
Owner
Order Count
Add
Remove
Purchase Order ID
Order Date
Total Order Cost
Supplier ID
Top
Up
Down
Bottom
5
Use SHIFT + click to select adjacent fields. Use CTRL + click to select an assortment of fields.
6
Save
Cancel
Purchase Order Compact Layouts
Compact Layout Assignment
10
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:
Purchase Order Compact Layout
9
Save
Cancel

Purchase Order Validation Rule

Help for this Page

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

Save | Save & New | Cancel

Rule Name: Expected_Delivery_Date_Validation 3

Active: ☑ 4

Description:

Quick Tips

- Operators & Functions

Error Condition Formula

* = Required Information

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

Insert Field | Insert Operator

```
(Expected_Delivery_Date__c   -  Order_Date__c )> 7
```

5

Functions

-- All Function Categories --

ABS
ACOS
ADDMONTHS
AND
ASCII
ASIN

SETUP

Profiles

Set the permissions and page layouts for this profile.

Profile Edit

Save | Save & New | Cancel

Name: Purchase Manager

User License: Salesforce

Description:

Custom Profile ✓

Custom App Settings

* = Required Information

	Visible	Default
All Tabs (standard__AllTabSet)	☑	○
Analytics Studio (standard__Insights)	☑	○
App Launcher (standard__AppLauncher)	☑	○
Bolt Solutions (standard__LightningBolt)	☑	○
Community (standard__Community)	☑	○
Content (standard__Content)	☑	○
Data Manager (standard__DataManager)	☑	○
Digital Experiences (standard__SalesforceCMS)	☑	○
Lightning Usage App (standard__LightningInstrumentation)	☑	○
Marketing CRM Classic (standard__Marketing)	☑	○
Medical Inventory Management (Medical_Inventory_Management)	☐	◉
Queue Management (standard__QueueManagement)	☑	○
Sales (standard__LightningSales)	☑	○
Sales (standard__Sales)	☑	○
Sales Console (standard__LightningSalesConsole)	☑	○
Salesforce Chatter (standard__Chatter)	☑	○
Salesforce Scheduler Setup (standard__LightningScheduler)	☐	○
Sample Console (standard__ServiceConsole)	☐	○
Service (standard__Service)	☑	○
Service Console (standard__LightningService)	☑	○
Site.com (standard__Sites)	☑	○
Subscription Management (standard__RevenueCloudConsole)	☑	○
WDC (standard__Work)	☑	○

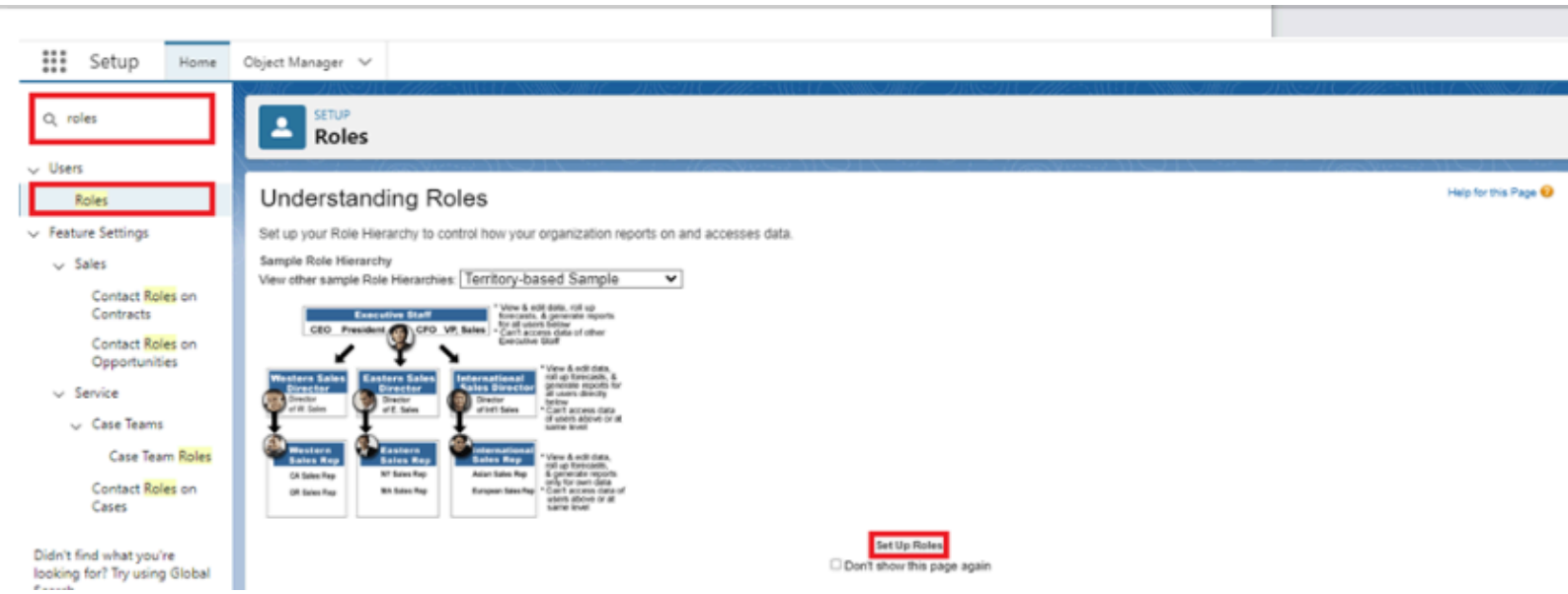
Custom Object Permissions

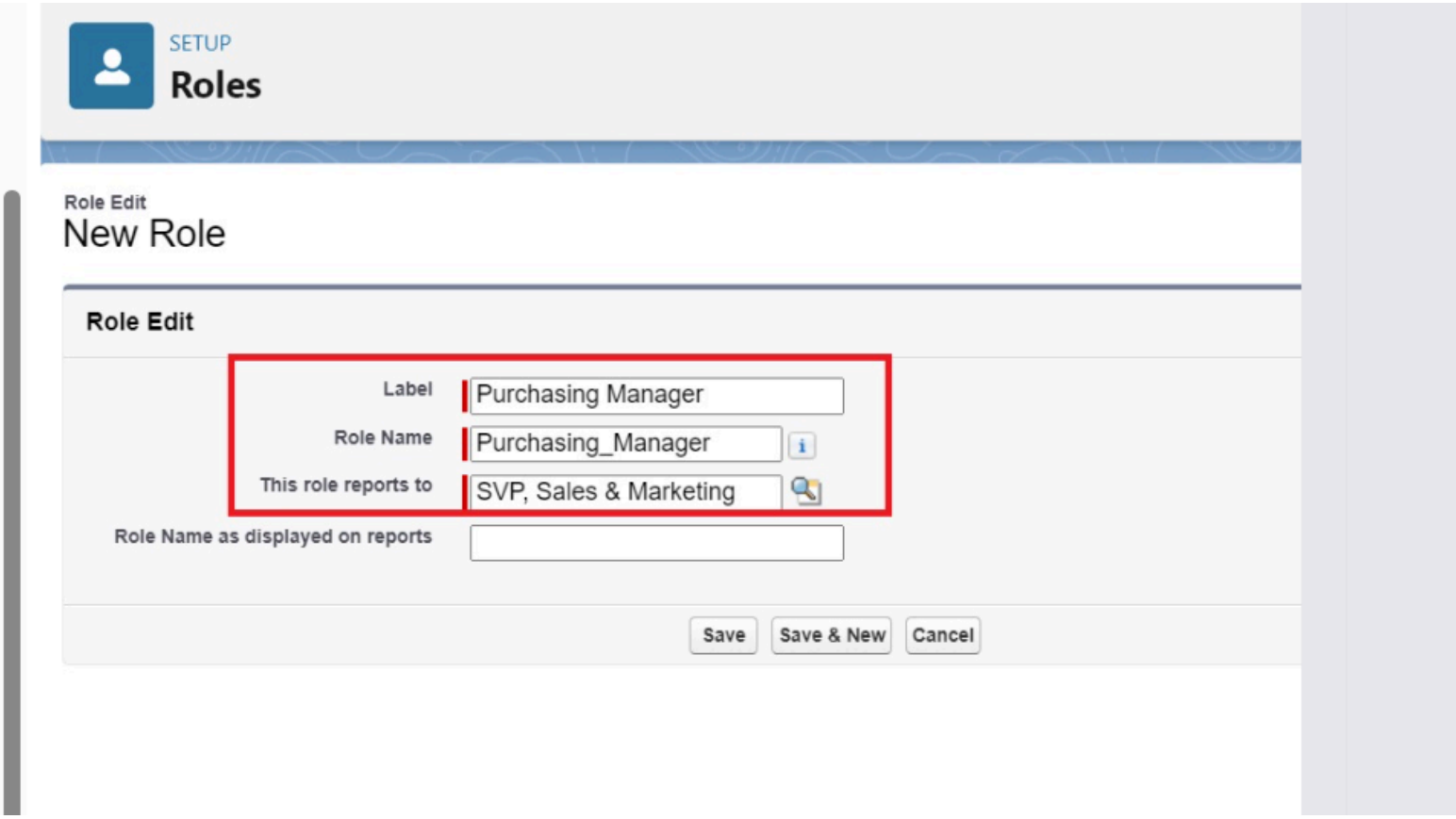
	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
Inventory Transactions	☑	☐	☐	☐	☑	☐
Order Items	☑	☐	☐	☐	☑	☐
Products	☑	☐	☐	☐	☑	☐
Purchase Orders	☑	☐	☐	☐	☑	☐
Suppliers	☑	☐	☐	☐	☑	☐

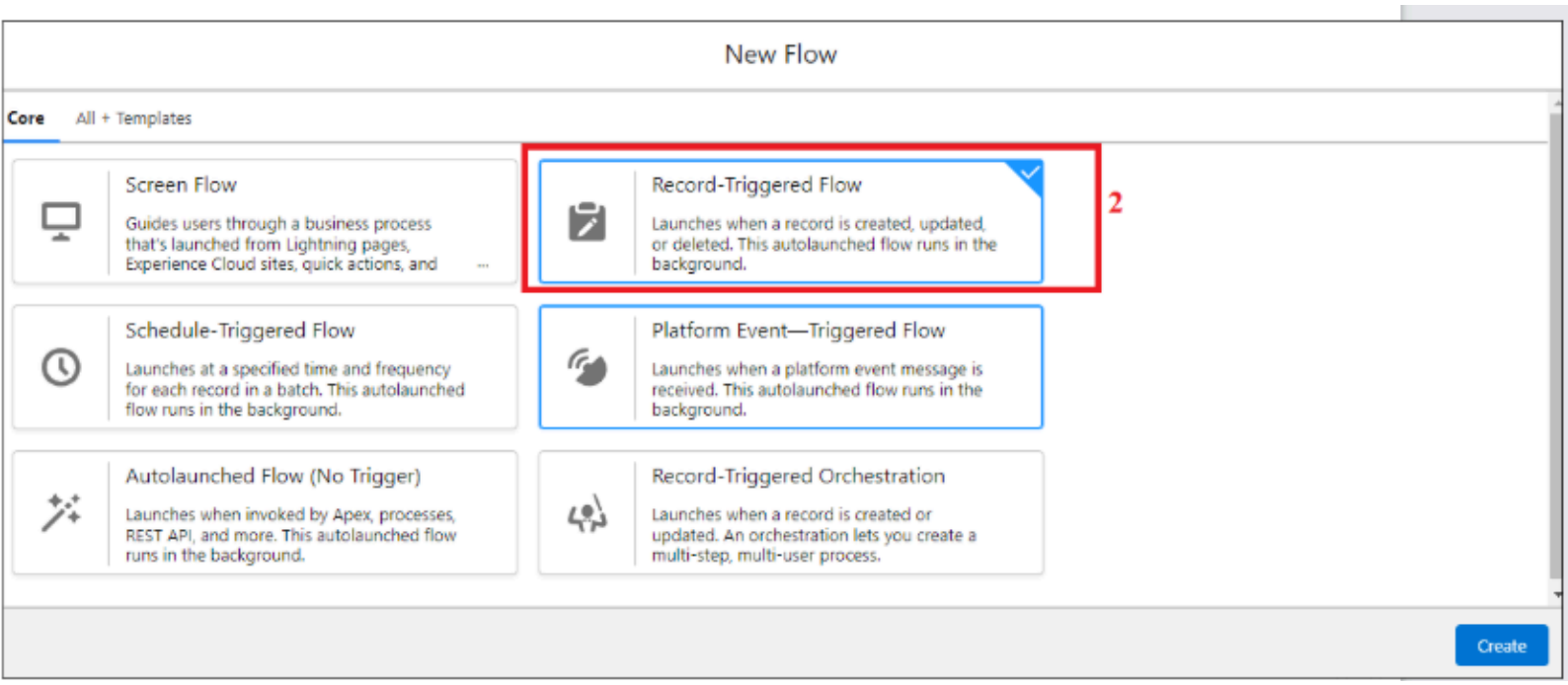
Password Policies

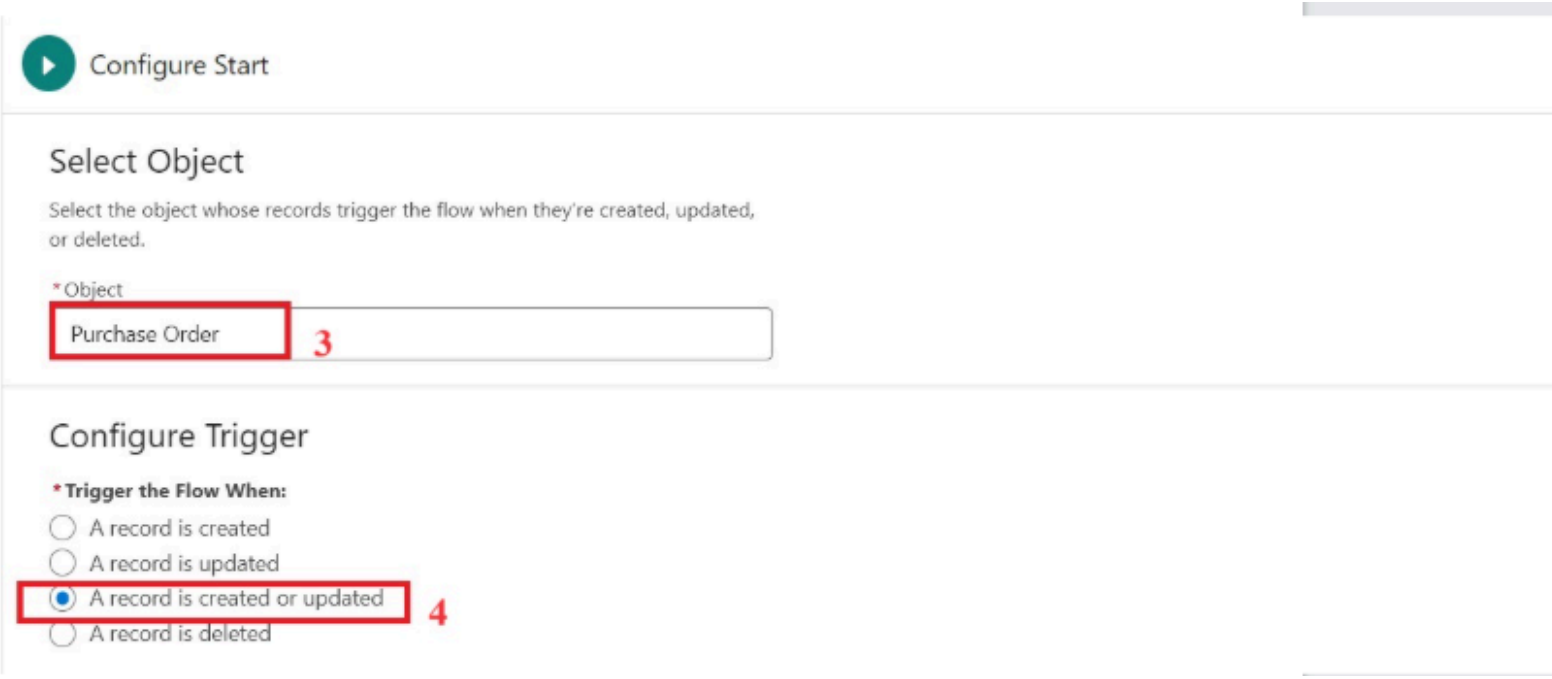
User passwords expire in	Never expires
Enforce password history	3 passwords remembered
Minimum password length	8
Password complexity requirement	Must include alpha and numeric characters
Password question requirement	Cannot contain password
Maximum invalid login attempts	10
Lockout effective period	15 minutes
Obscure secret answer for password resets	☐
Require a minimum 1 day password lifetime	☐
Don't immediately expire links in forgot password emails	☐

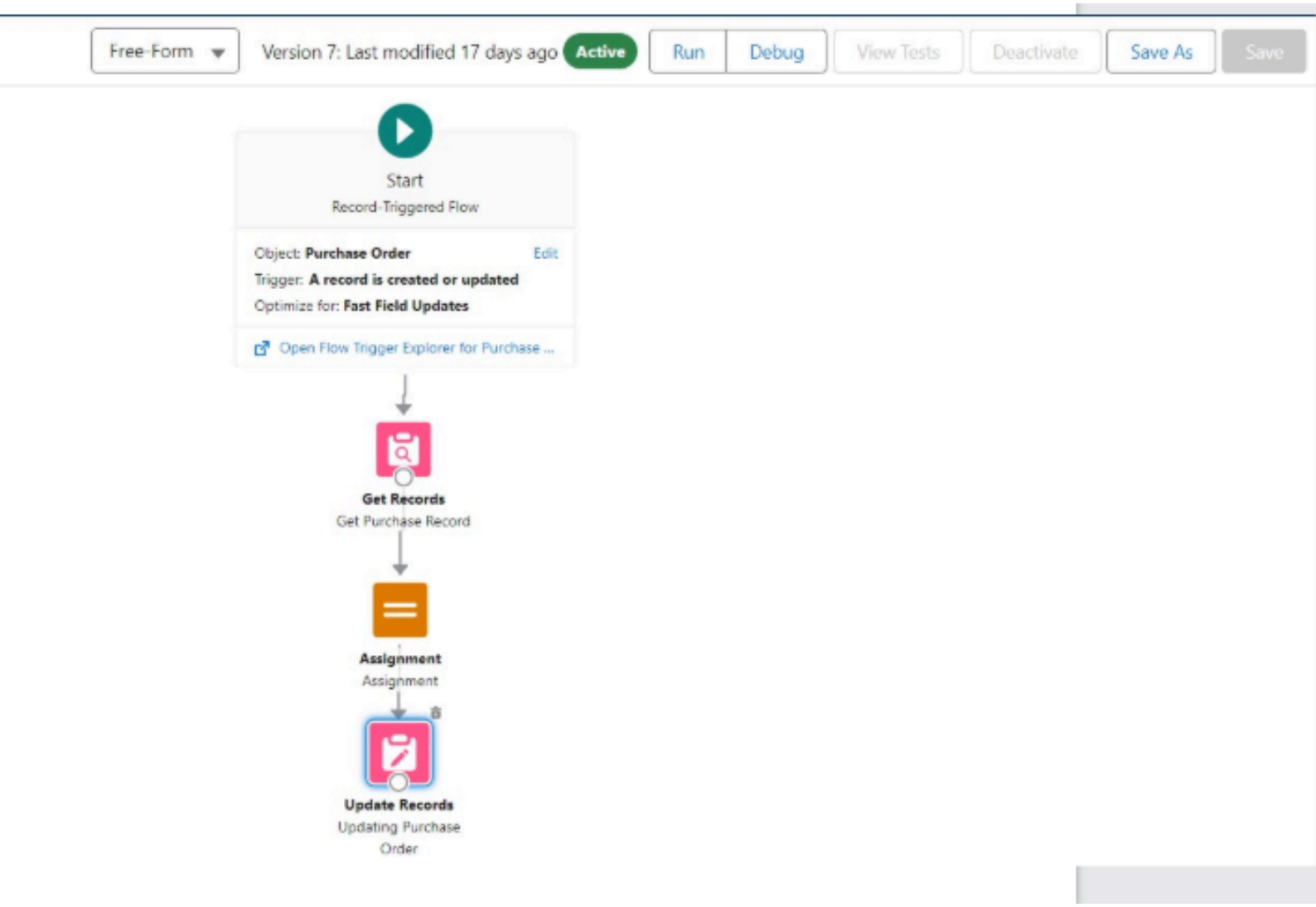
Save | Save & New | Cancel

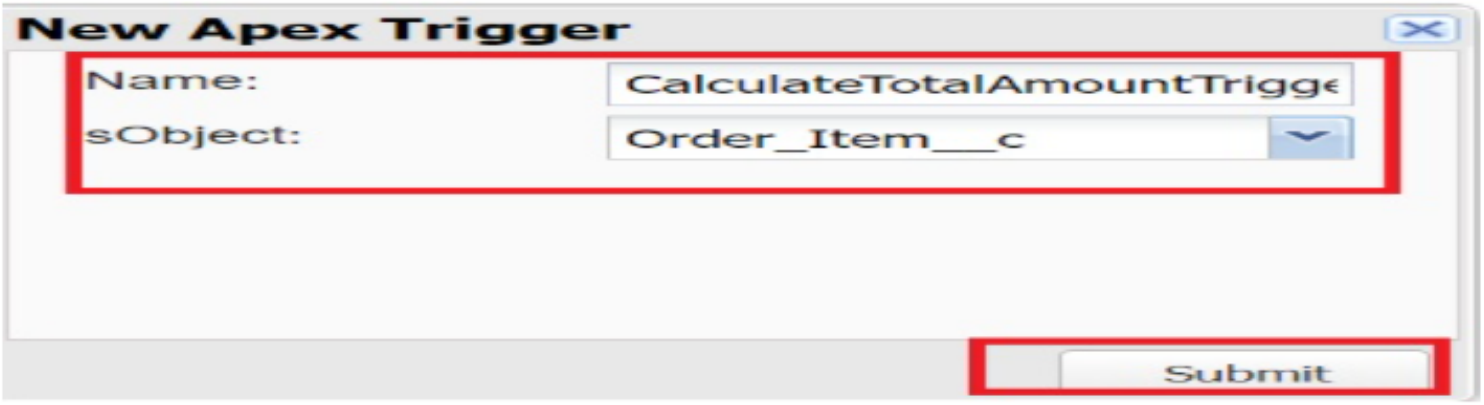

Setup
Home
Object Manager
roles
Users
Roles
Feature Settings
Sales
Contact Roles on Contracts
Contact Roles on Opportunities
Service
Case Teams
Case Team Roles
Contact Roles on Cases
Didn't find what you're looking for? Try using Global
SETUP
Roles
Understanding Roles
Help for this Page
Set up your Role Hierarchy to control how your organization reports on and accesses data.
Sample Role Hierarchy
View other sample Role Hierarchies:
Territory-based Sample
Executive Staff
Western Sales Director
Eastern Sales Director
International Sales Director
Western Sales Rep
Eastern Sales Rep
International Sales Rep
Set Up Roles
Don't show this page again


SETUP
Roles
Role Edit
New Role
Role Edit
Label
Purchasing Manager
Role Name
Purchasing_Manager
This role reports to
SVP, Sales & Marketing
Role Name as displayed on reports
Save
Save & New
Cancel


New Flow
Core
All + Templates
Screen Flow
Guides users through a business process that's launched from Lightning pages, Experience Cloud sites, quick actions, and
Record-Triggered Flow
Launches when a record is created, updated, or deleted. This autolaunched flow runs in the background.
2
Schedule-Triggered Flow
Launches at a specified time and frequency for each record in a batch. This autolaunched flow runs in the background.
Platform Event—Triggered Flow
Launches when a platform event message is received. This autolaunched flow runs in the background.
Autolaunched Flow (No Trigger)
Launches when invoked by Apex, processes, REST API, and more. This autolaunched flow runs in the background.
Record-Triggered Orchestration
Launches when a record is created or updated. An orchestration lets you create a multi-step, multi-user process.
Create


Configure Start
Select Object
Select the object whose records trigger the flow when they're created, updated, or deleted.
* Object
Purchase Order
3
Configure Trigger
* Trigger the Flow When:
A record is created
A record is updated
A record is created or updated
4
A record is deleted


Free-Form
Version 7: Last modified 17 days ago
Active
Run
Debug
View Tests
Deactivate
Save As
Save
Start
Record-Triggered Flow
Object: Purchase Order
Edit
Trigger: A record is created or updated
Optimize for: Fast Field Updates
Open Flow Trigger Explorer for Purchase ...
Get Records
Get Purchase Record
Assignment
Assignment
Update Records
Updating Purchase Order


New Apex Trigger
Name:
CalculateTotalAmountTrigge
sObject:
Order_Item__c
Submit

orgfarm-fb47cf13fd-dev-ed.develop.lightning.force.com/lightning/r/Report/00OgL000004pjqPUAQ/view?queryScope=userFolders

Search...

Medical Inventory ... | Purchase Orders | Suppliers | Reports | Inventory Transactions | Dashboards

Report: Purchase Orders

Purchase Orders based on Suppliers

Enable Field Editing | Add Chart | Edit

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

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

Row Counts | Detail Rows | Subtotals | Grand Total

orgfarm-fb47cf13fd-dev-ed.develop.lightning.force.com/lightning/r/Report/00OgL000004pjqPUAQ/view?queryScope=userFolders

Search...

Medical Inventory ... | Purchase Orders | Suppliers | Reports | Inventory Transactions | Dashboards

REPORT

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

Add Chart | Save & Run | Save | Close | Run

Outline | Filters

Previewing a limited number of records. Run the report to see everything.

Update Preview Automatically

Groups

GROUP ROWS

- Supplier ID
- Actual Delivery Date
- Purchase Order: Purchase Order ID

GROUP COLUMNS

Columns

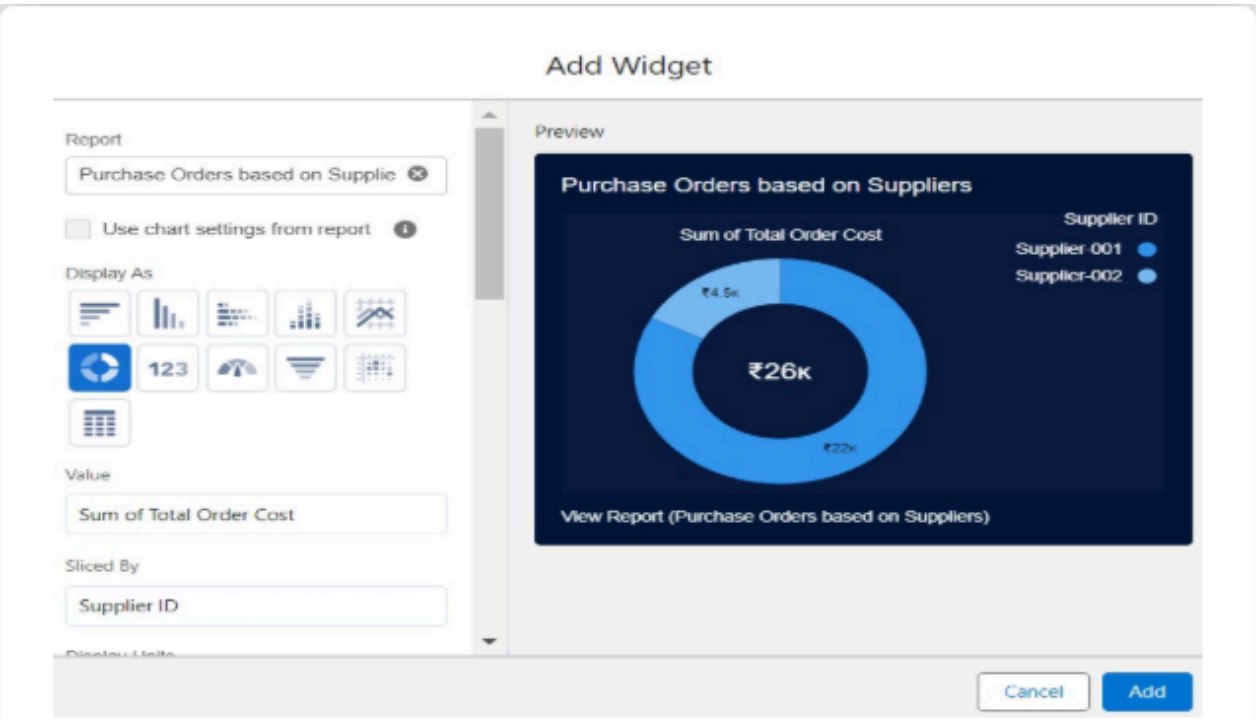
Add column...

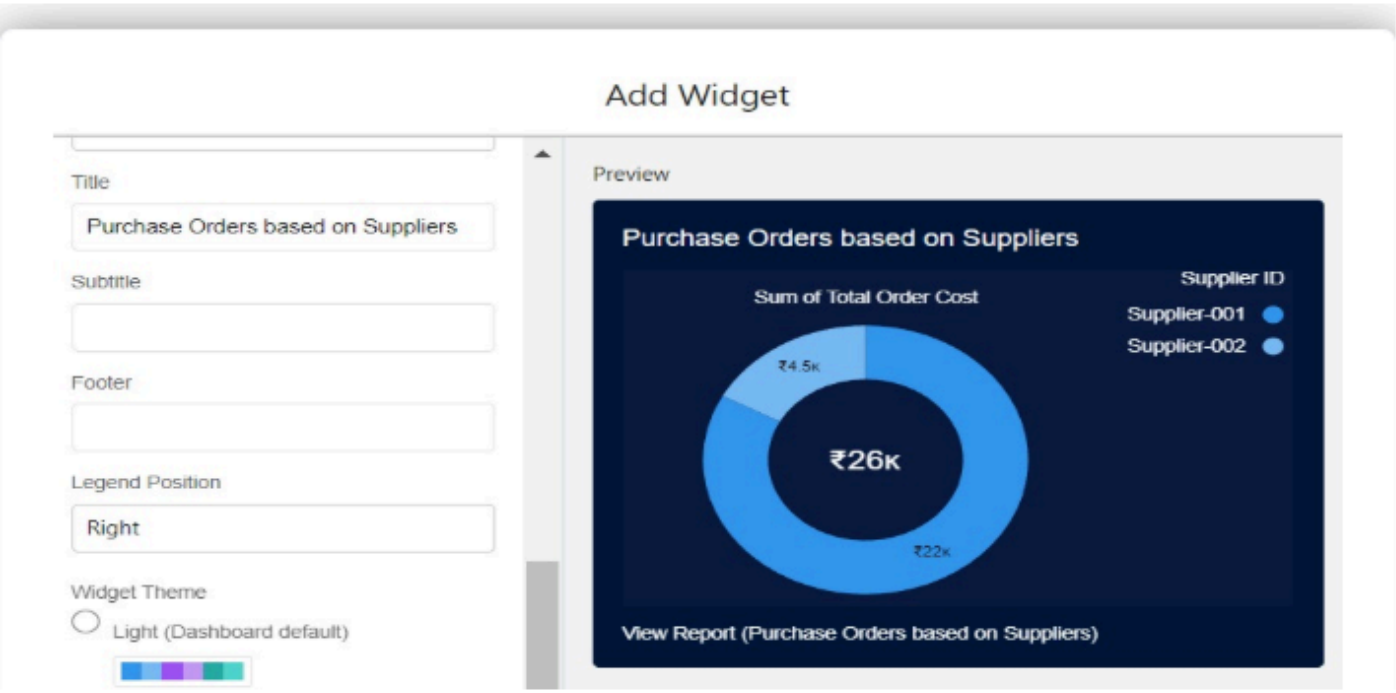
- Product ID: Product ID
- # Order Count
- Product ID: Product Name
- # Quantity Received
- # Amount

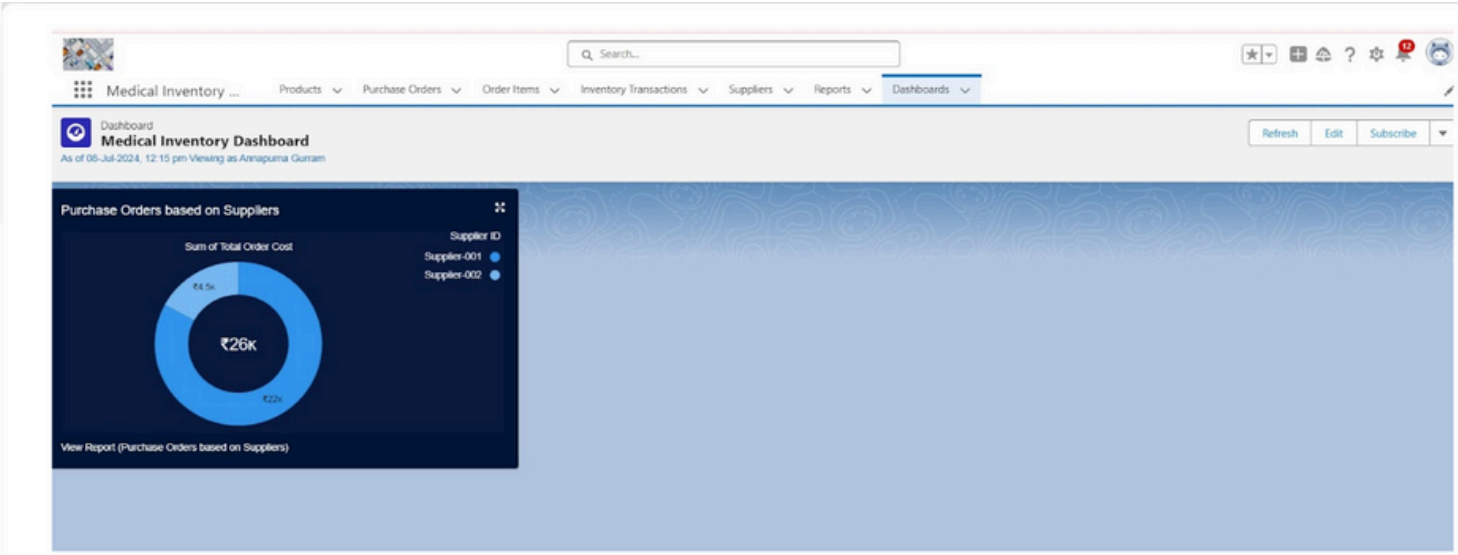
Supplier ID	Actual Delivery Date	Purchase Order: Purchase Order ID	Product ID: Product ID	Order Count	Product ID: Product Name	Quantity Received	Amount
Supplier-001 (12)	18/06/2024 (2)	Purchase-0002 (2)	Gen-0001	2	Syringes	50	₹250.00
			Cap-0001	2	Dolo 650	150	₹3,000.00
		Subtotal		2		200	₹3,250.00
	Subtotal			2		200	₹3,250.00
	22/06/2024 (3)	Purchase-0001 (3)	Gen-0001	3	Syringes	5	₹25.00
			Gen-0001	3	Syringes	10	₹50.00
			Cap-0001	3	Dolo 650	100	₹2,000.00
		Subtotal		3		115	₹2,075.00
	Subtotal			3		115	₹2,075.00
	23/06/2024 (3)	Purchase-0003 (3)	Syr-0001	3	Calpol 120mg Syrup	100	₹4,000.00
			Cap-0001	3	Dolo 650	50	₹1,000.00
			Gen-0001	3	Syringes	400	₹2,000.00
		Subtotal		3		550	₹7,000.00
	Subtotal			3		550	₹7,000.00
	11/07/2024 (4)	Purchase-0004 (4)	Syr-0001	4	Calpol 120mg Syrup	100	₹4,000.00
			IV-0001	4	Saline	50	₹2,500.00
			Cap-0001	4	Dolo 650	100	₹2,000.00
			Gen-0001	4	Syringes	200	₹1,000.00

Row Counts | Detail Rows | Subtotals | Grand Total

Conditional Formatting


Add Widget
Report
Purchase Orders based on Supplie
Use chart settings from report
Display As
123
Value
Sum of Total Order Cost
Sliced By
Supplier ID
Preview
Purchase Orders based on Suppliers
Sum of Total Order Cost
Supplier ID
Supplier-001
Supplier-002
₹4.5K
₹26K
₹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)
Preview
Purchase Orders based on Suppliers
Sum of Total Order Cost
Supplier ID
Supplier-001
Supplier-002
₹4.5K
₹26K
₹22K
View Report (Purchase Orders based on Suppliers)


Search...
Medical Inventory ...
Products
Purchase Orders
Order Items
Inventory Transactions
Suppliers
Reports
Dashboards
Dashboard
Medical Inventory Dashboard
Refresh
Edit
Subscribe
Purchase Orders based on Suppliers
Sum of Total Order Cost
Supplier ID
Supplier-001
Supplier-002
₹26K
View Report (Purchase Orders based on Suppliers)

ADVANTAGES & DISADVANTAGES :

- Advantages → Efficiency, automation,
- accuracy, security.
- Disadvantages → Cost, training needs, and dependency on Salesforce platform.

APPENDIX :

CalculateTotalAmountTrigger :

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

    // Call the handler class to handle the logic

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

}
```

CalculateTotalAmountHandler.cls :

```
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;

     }

   }

  }

}
```

CONCLUSION :

The Medical Inventory Management project successfully demonstrates how Salesforce can be used to create an efficient, automated, and secure solution for managing medical products, suppliers, and stock levels. By integrating features such as real-time tracking, approval processes, and analytical reports, the system ensures that healthcare providers and pharmacies can maintain optimal inventory levels while minimizing wastage and shortages.