PROJECT TITLE : MEDICAL INVENTORY MANAGEMENT SYSTEM

COLLEGE NAME :NANDHA ARTS AND SCIENCE COLLEGE

COLLEGE CODE : bru4j

TEAM ID: NM2025TMID22921

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INTODUCTION

- **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.
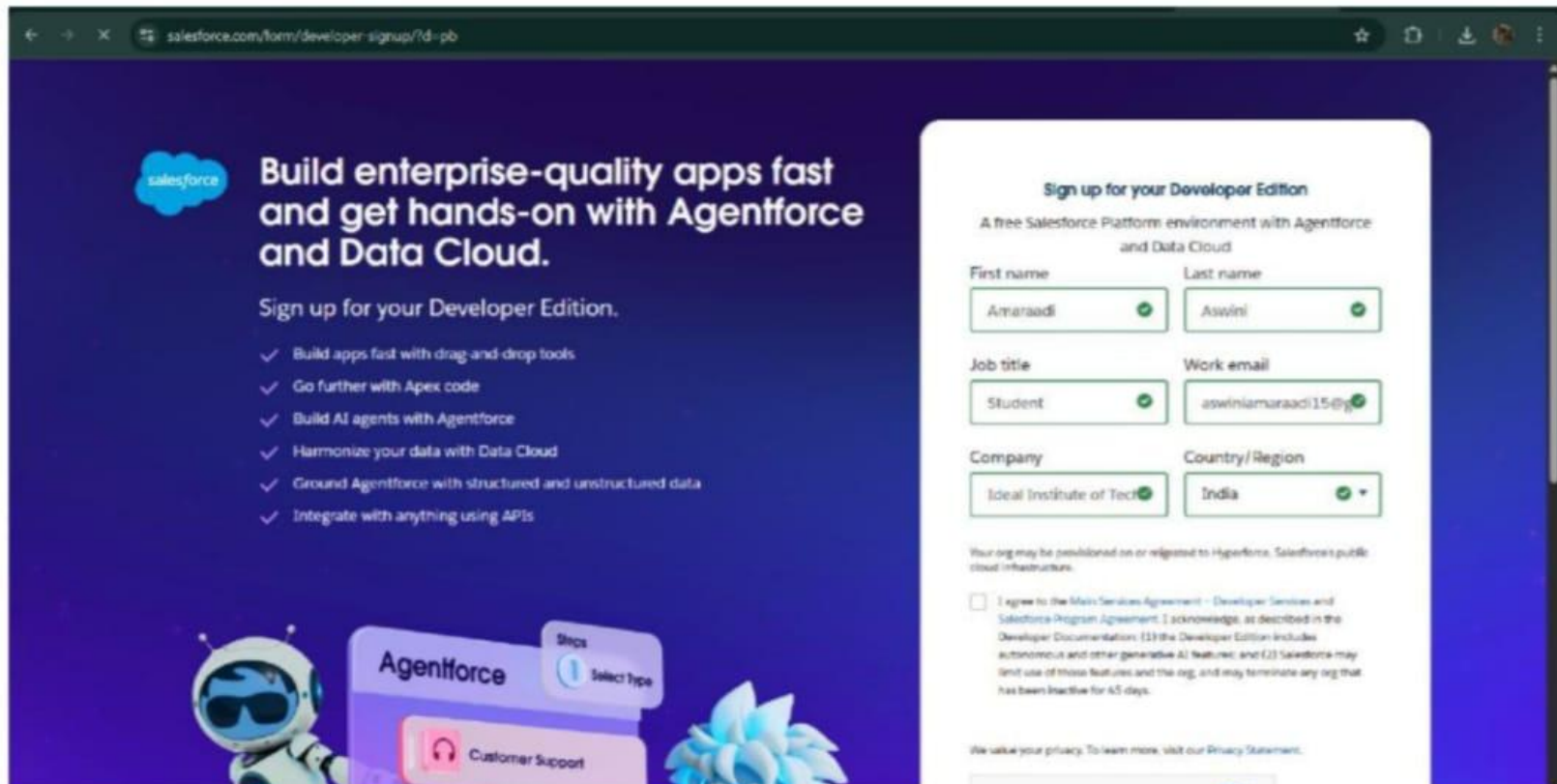
Objectives

1. Develop a centralized platform to manage medical inventory.

2. Enable real-time tracking of stock levels and expiry dates.

3. Generate automated alerts for low-stock and near-expiry products.

4. Maintain a transaction history for audits and regulatory compliance.

5. Provide analytics dashboards for decision-making

DEVELOPER PHASE

Creating Developer Account:

By using this URL –

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

Create Purchase Order, Order Item, Inventory Transaction and Supplier objects.

Purchase Order

Details

Edit   Delete

Description

API Name
Purchase_Order__c

Custom
✓

Singular Label
Purchase Order

Plural Label
Purchase Orders

Enable Reports
✓

Track Activities

Track Field History

Deployment Status
Deployed

Help Settings
Standard salesforce.com Help Window

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

javascript:void(0);

Search Setup

Setup   Home   Object Manager

Order Item

Details

Edit   Delete

Description

API Name
Order_Item__c

Custom
✓

Singular Label
Order Item

Plural Label
Order Items

Enable Reports
✓

Track Activities

Track Field History

Deployment Status
Deployed

Help Settings
Standard salesforce.com Help Window

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Configured fields and relationships

Order Item

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

Fields & Relationships
9 Items, Sorted by Field Label

Quick Find | New | Deleted Fields | Field Dependencies | Set History Tracking

FIELD LABEL ▲	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
label Amount	label_Amount__c	Formula (Currency)		
Last Modified By	LastModifiedById	Lookup(User)		
Order Item ID	Name	Text(80)		✓
Product ID	Product_ID_c	Lookup(Product)		✓
Purchase Order ID	Purchase_Order_ID_c	Master-Detail(Purchase Order)		✓

Developed Lightning App with relevant tabs

← | 🖿 Lightning App Builder | ⚙ App Settings | 🗎 Pages ⌄ | Medical Inventory Management | ? Help

App Settings

App Details & Branding
App Options
Utility Items (Desktop Only)
Navigation Items
User Profiles

App Details & Branding
Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.

App Details

* App Name ⓘ
Medical Inventory Management

* Developer Name ⓘ
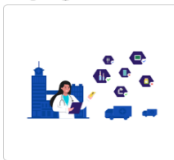Medical_Inventory_Management

Description ⓘ
Enter a description...

App Branding

Image ⓘ

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

App Settings

App Details & Branding

App Options

Utility Items (Desktop Only)

Navigation Items

User Profiles

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   🔄 | Create ∨   **Selected Items**

🔍 Type to filter list...

📊	Accounts
🎯	Activation Targets
🔀	Activations
🗂	All Sites
📇	Alternative Payment Methods
🖼	Analytics

▶

◀

🏷	Purchase Orders
⚖	Products
🧰	Order Items
⏱	Inventory Transactions
🏛	Suppliers
📋	Reports
👁	Dashboards

▲

▼

Editing of Page Layouts

Product

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Save ▼	Quick Save	Preview As... ▼	Cancel	↩ Undo	↪ Redo	🔲 Layout Properties

🔍 **Quick Find** | Field Name | ✖

Fields
Buttons
Quick Actions
Mobile & Lightning Actions
Expanded Lookups
Related Lists
Report Charts

➕🔲 Section	Expiry Date	Product Description
➕🔲 Blank Space	Last Modified By	Product ID
Created By	Minimum Stock Level	Product Name
Current Stock Level	Owner	Unit Price

Information (Header visible on edit only)

⭐ 🔵 Product ID	Sample Text	⭐ 🔵 Unit Price	$123.45
⭐ 🔵 Product Name	Sample Text	Current Stock Level	52,177
⭐ 🔵 Product Description	Sample Text	Minimum Stock Level	51,355
		⭐ 🔵 Expiry Date	9/18/2025
		Owner	Sample Text

SETUP > OBJECT MANAGER

Purchase Order

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

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	Expected Delivery...	Owner
Blank Space	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   🔒 Actual Delivery Date   9/18/2025
⭐ ● Supplier ID   Sample Text   🔒 Order Count   35,335
⭐ ● Order Date   9/18/2025   🔒 Total Order Cost $123.45
⭐ ● Expected Delivery Date   9/18/2025   Owner   Sample Text

System Information (Header visible on edit only)

SETUP > OBJECT MANAGER

Order Item

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

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

Fields
Buttons
Quick Actions
Mobile & Lightning Actions
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Related Lists
Report Charts

🔍 Quick Find | Field Name | ✖

Section	Last Modified By	Quantity Ordered
Blank Space	Order Item ID	Quantity Received
Created By	Product ID	Unit Price
label Amount	Purchase Order ID	

Information (Header visible on edit only)
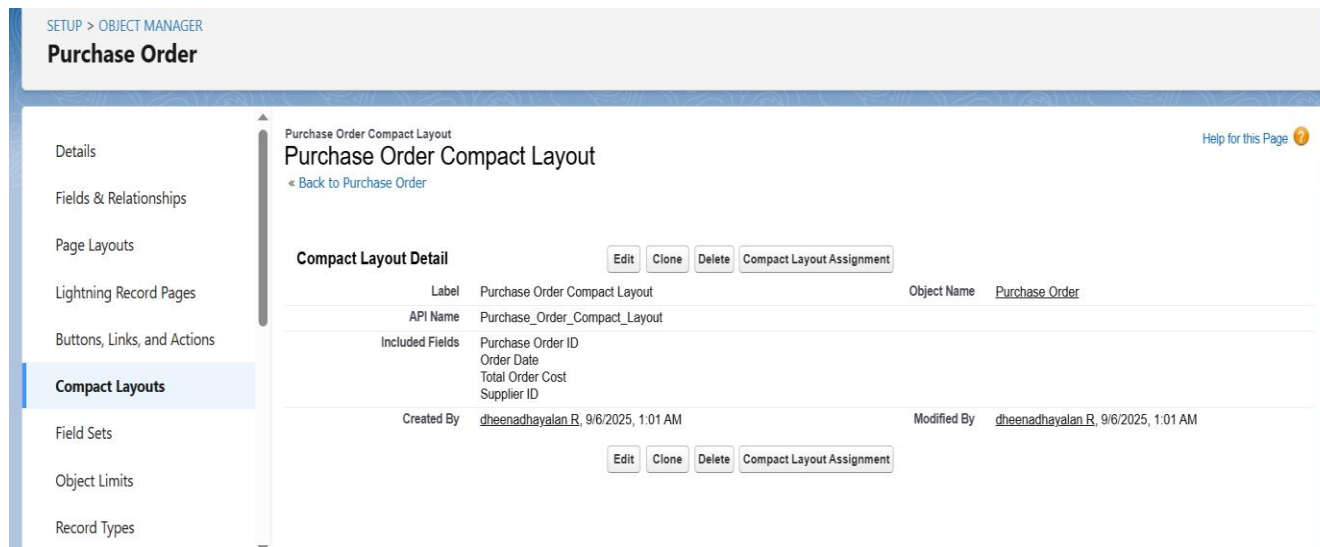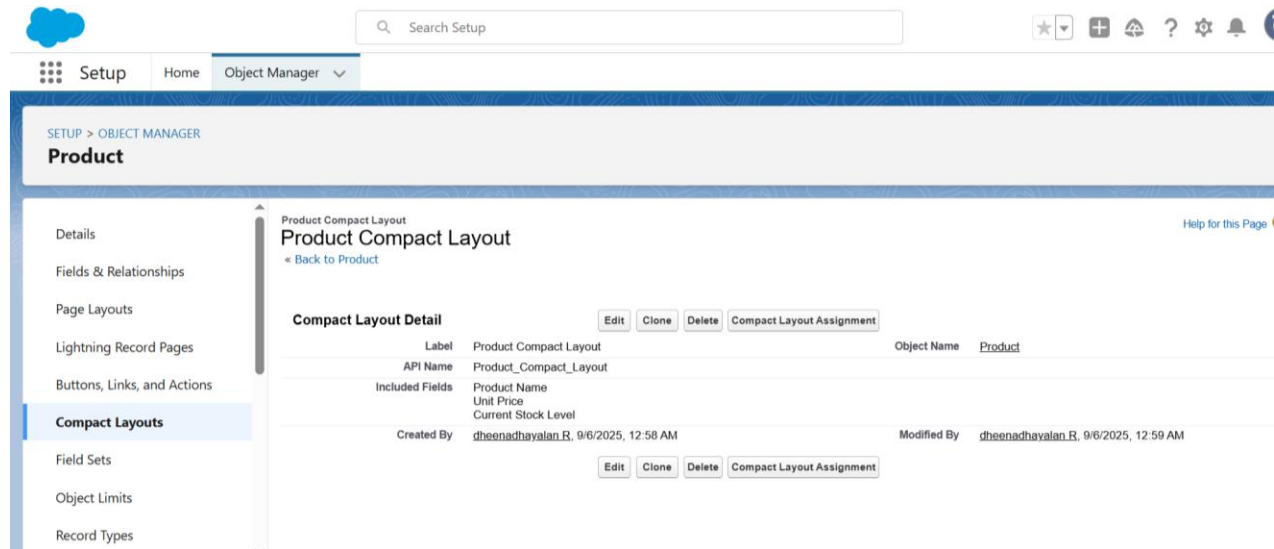
⭐ ● Order Item ID   Sample Text   ⭐ ● Purchase Order ID   Sample Text
🔒 label Amount $123.45   ⭐ ● Quantity Ordered   72,169
⭐ ● Product ID   Sample Text   Quantity Received   93,448
🔒 Unit Price $123.45

System Information (Header visible on edit only)

🔒 Created By   Sample Text   🔒 Last Modified By   Sample Text

Compact Layouts

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

Validation Rules

Q Search Setup

SETUP > OBJECT MANAGER

Purchase Order

Purchase Order Validation Rule

Back to Purchase Order

Help for this Page

Validation Rule Detail   [Edit] [Clone]

Rule Name	Expected_Delivery_Date_Validation	**Active**	✓
Error Condition Formula	(Expected_Delivery_Date__c - Order_Date__c)> 7		
Error Message	The Expected Delivery Date should not exceed 7 days.	**Error Location**	Top of Page
Description			
Created By	dheenadhayalan R, 9/6/2025, 1:04 AM	**Modified By**	dheenadhayalan R, 9/6/2025, 1:04 AM

[Edit] [Clone]

Details

Fields & Relationships

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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.

Roles And Users

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.

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

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
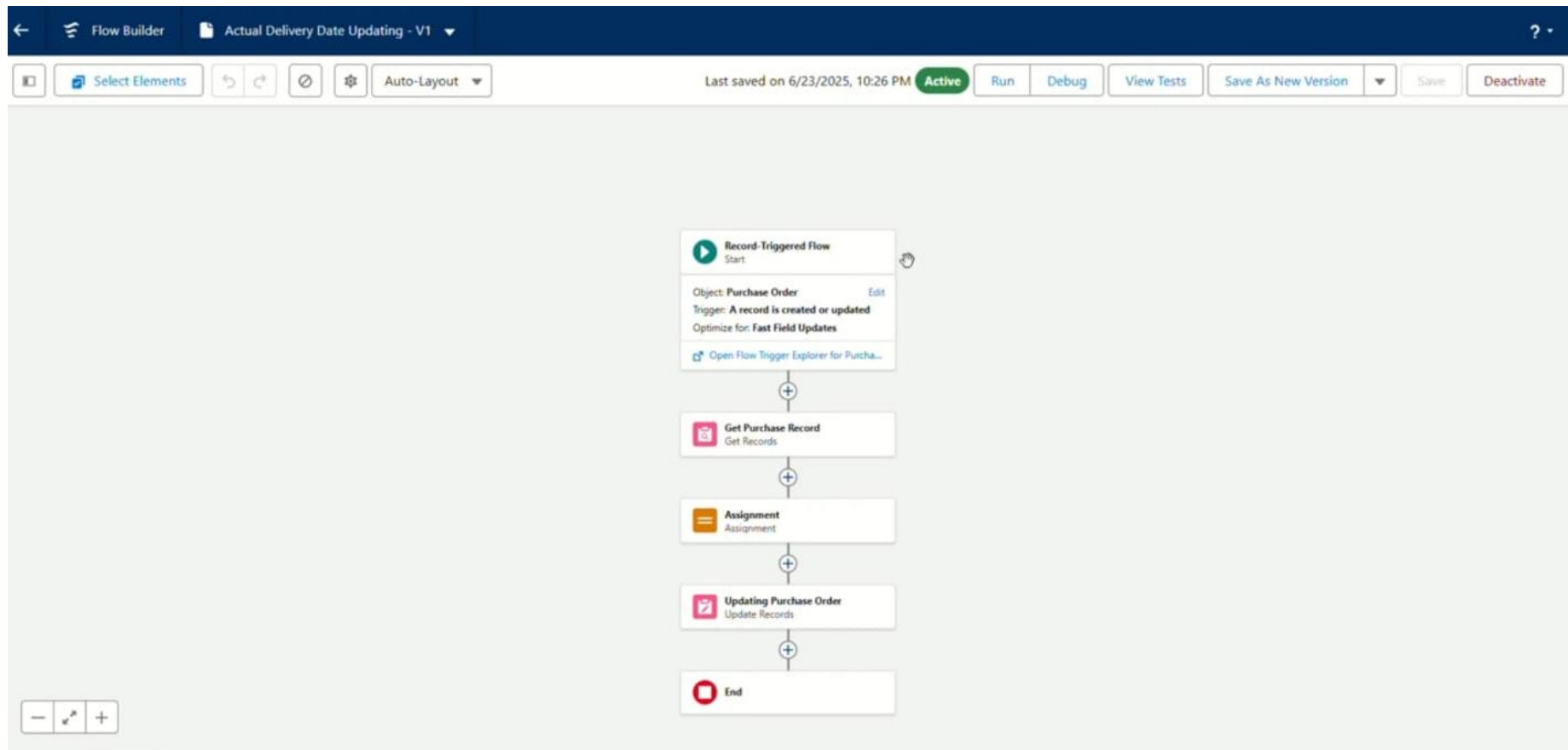
Triggers

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.

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
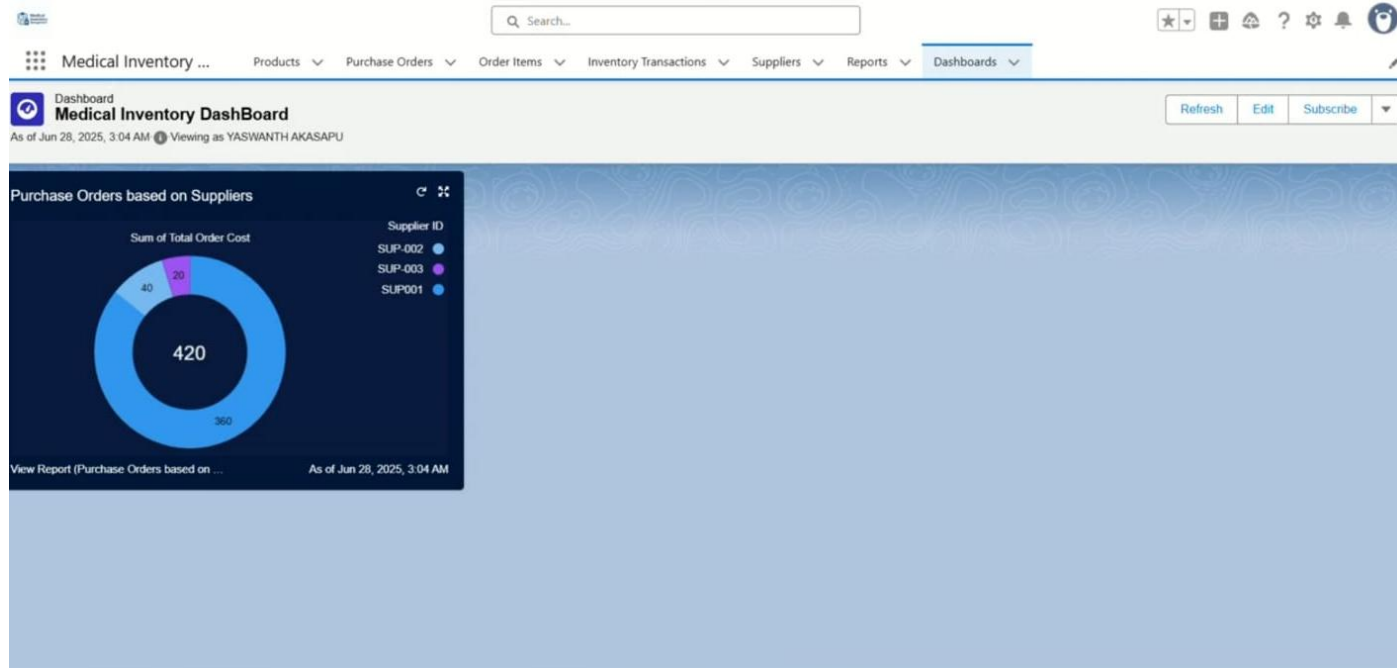
Dashboards

Dashboards in Salesforce are dynamic visual representations of key metrics and data from reports, providing a consolidated view of organizational performance and trends.

Conclusion

The proposed Smart Medical Inventory Management System will optimize resourceus
age, ensure timely availability of medicines, reduce wastage, and support better patient care. This project aligns with Naan Mudhalvan's objective of creating industry-relevant, impactful solutions for real-world problems.