

MEDICAL INVENTORY MANAGEMENT

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1.INTRODUCTION:

1.1 Project Overview:

The **Medical Inventory Management** is the systematic tracking and controlling of pharmaceuticals, medical supplies, and equipment within a healthcare facility to ensure their availability, reduce waste, and maintain patient safety. Key components include demand forecasting, stock monitoring, supplier management, inventory tracking software with features like barcode scanning and real-time updates, and adherence to quality control and regulatory compliance. Effective management leads to optimized costs, fewer supply shortages, better resource allocation, and ultimately, improved patient care and outcomes.

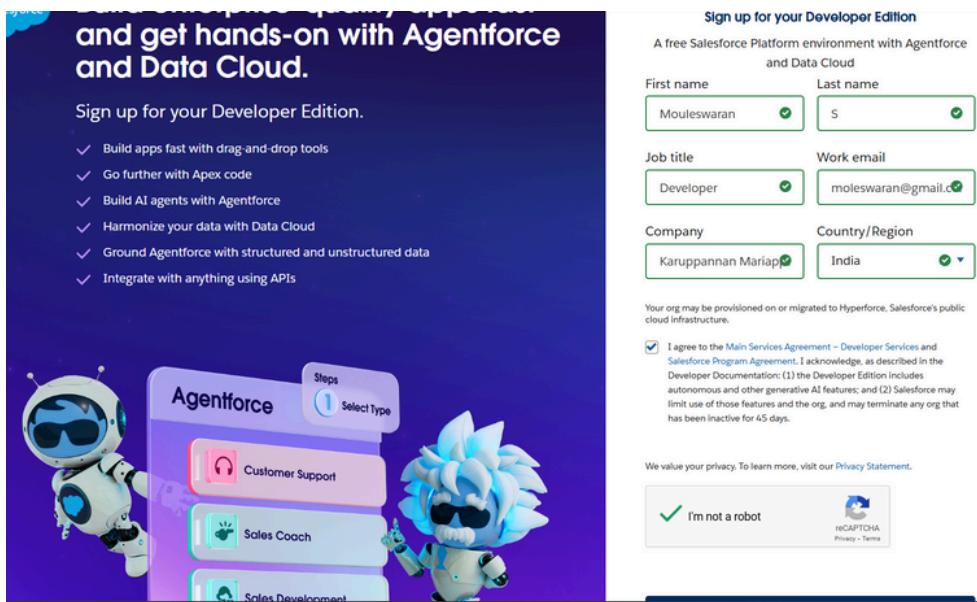
1.2 Purpose:

The purpose of **Medical Inventory Management** is to ensure patient safety and quality care by maintaining optimal stock levels of medical supplies, medications, and equipment, preventing shortages, minimizing waste from expired or unused items, and improving the overall efficiency and cost-effectiveness of healthcare facilities. It supports accurate tracking, regulatory compliance, streamlined workflows, and better resource allocation within hospitals, clinics, and pharmacies.

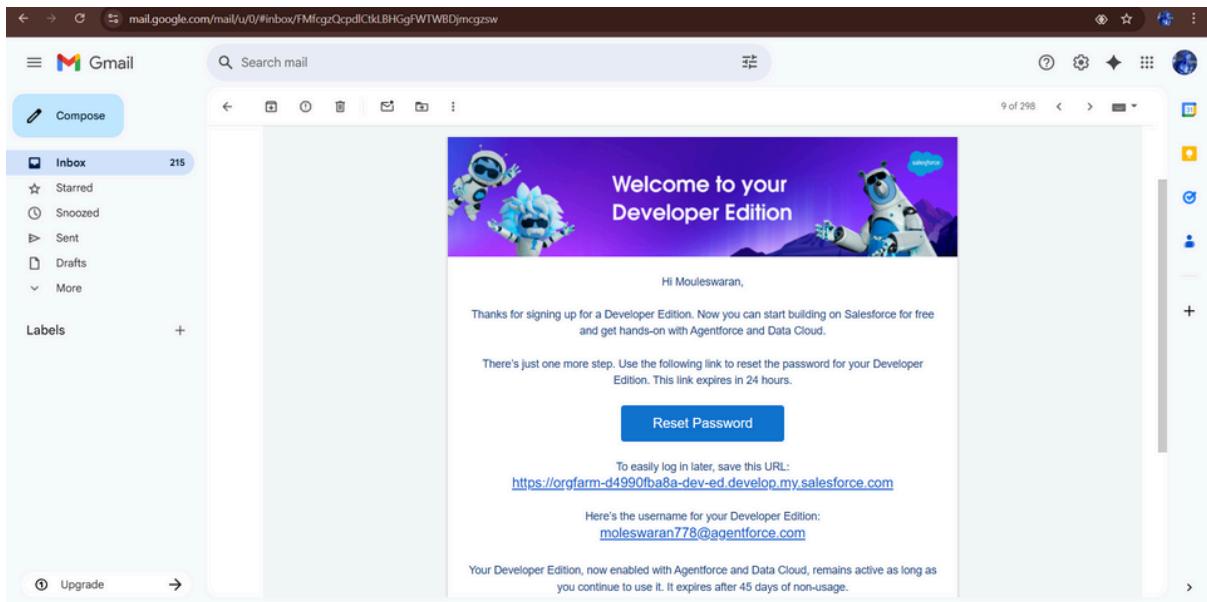
DEVELOPMENT PHASE

Creating Developer Account:

By using this URL <https://developer.salesforce.com/signup>



- **Account activation**



- **Created objects: Product, Purchase Order, Order Item, Inventory Management, Supplier**

Fields & Relationships				
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Current Stock Level	Current_Stock_Level__c	Number(18, 0)		
Expiry Date	Expiry_Date__c	Date		
Last Modified By	LastModifiedById	Lookup(User)		
Minimum Stock Level	Minimum_Stock_Level__c	Number(18, 0)		
Owner	OwnerId	Lookup(User,Group)		
Product Description	Product_Description__c	Text Area(255)		
Product ID	Name	Text(80)		
Product Name	Product_Name__c	Text(255)		
Unit Price	Unit_Price__c	Currency(16, 2)		

Welcome to Salesforce: Reset your password

Recently Viewed | Products | Setup | Purchase Order | Salesforce | Student

orgfarm-c263fdeb71-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01lgK000001y0Xt/Details/view

The screenshot shows the 'Purchase Order' object details in the Salesforce setup. The left sidebar lists various configuration options like Fields & Relationships, Page Layouts, and Buttons, Links, and Actions. The main 'Details' section shows the API Name as 'Purchase_Order__c', which is custom. It also displays Singular Label ('Purchase Order') and Plural Label ('Purchase Orders'). On the right, there are checkboxes for enabling Reports, Activities, and Field History, all of which are checked. Deployment status is set to 'Deployed'. Help settings point to the standard salesforce.com help window.

Welcome to Salesforce: Reset your password

Recently Viewed | Products | Setup | Order Item | Salesforce | Student

orgfarm-c263fdeb71-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01lgK000001ymal/Details/view

The screenshot shows the 'Order Item' object details in the Salesforce setup. The left sidebar lists various configuration options. The main 'Details' section shows the API Name as 'Order_Item__c', which is custom. It displays Singular Label ('Order Item') and Plural Label ('Order Items'). On the right, there are checkboxes for enabling Reports, Activities, and Field History, all of which are checked. Deployment status is set to 'Deployed'. Help settings point to the standard salesforce.com help window.

The screenshot shows the Salesforce Setup interface with the title "SETUP > OBJECT MANAGER" and the object name "Inventory Transaction". The left sidebar lists various configuration options under "Details". The main "Details" section contains the following fields:

Field	Value
Description	
API Name	Inventory_Transaction__c
Custom	✓
Singular Label	Inventory Transaction
Plural Label	Inventory Transactions
Enable Reports	✓
Track Activities	
Track Field History	
Deployment Status	Deployed
Help Settings	Standard salesforce.com Help Window

Buttons at the top right include "Edit" and "Delete".

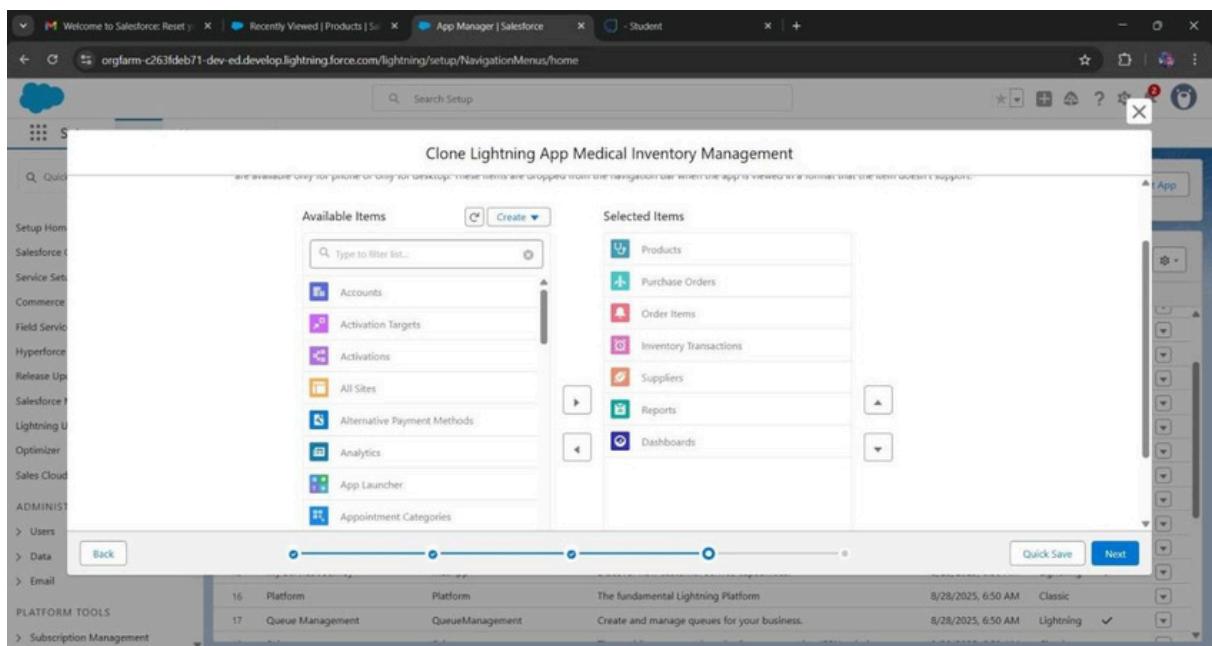
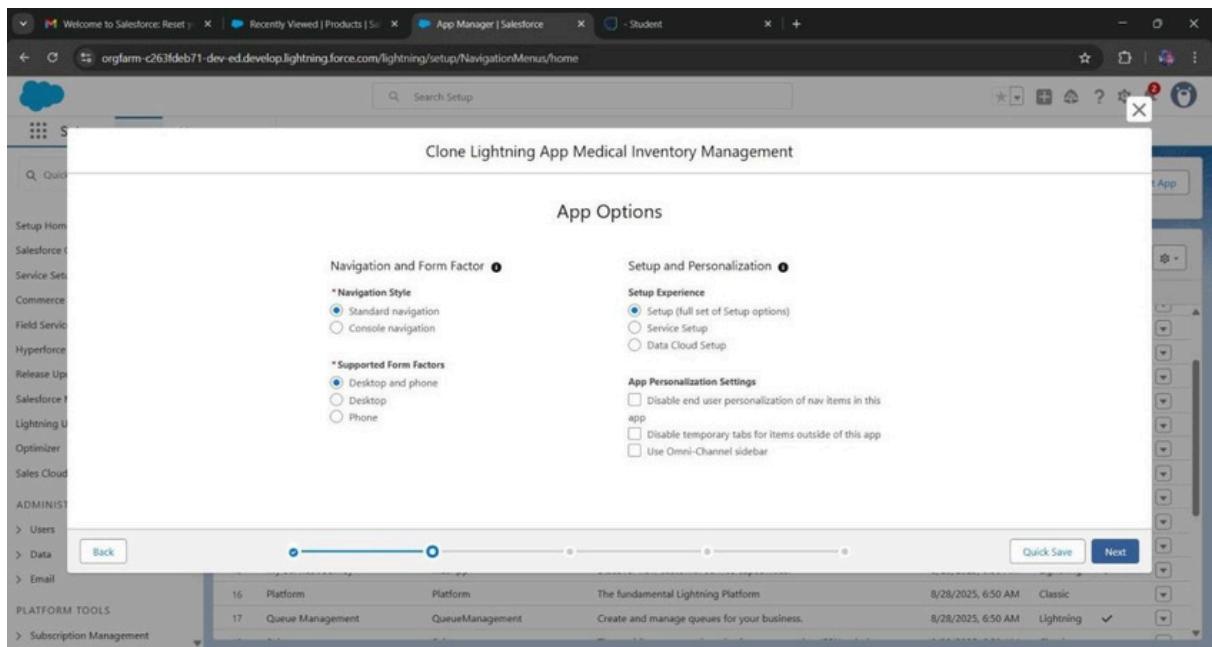
The screenshot shows the Salesforce Setup interface with the title "SETUP > OBJECT MANAGER" and the object name "Supplier". The left sidebar lists various configuration options under "Details". The main "Details" section contains the following fields:

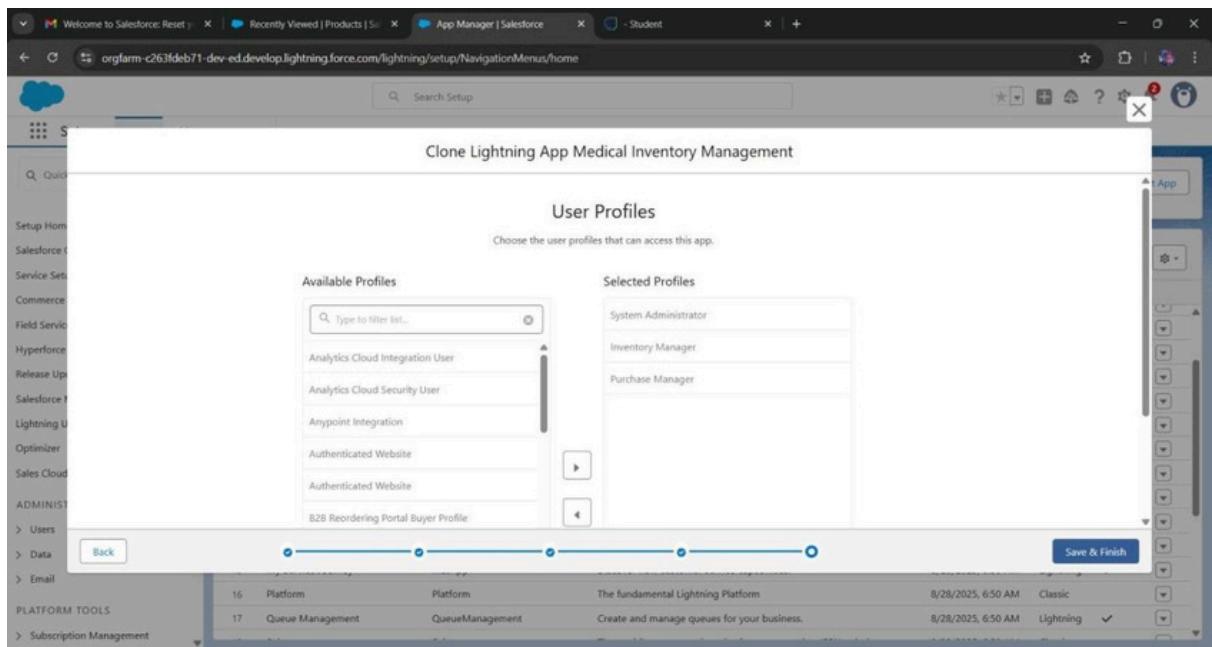
Field	Value
Description	
API Name	Supplier__c
Custom	✓
Singular Label	Supplier
Plural Label	Suppliers
Enable Reports	✓
Track Activities	
Track Field History	
Deployment Status	Deployed
Help Settings	Standard salesforce.com Help Window

Buttons at the top right include "Edit" and "Delete".

- **Create a Tabs**

- **Developed Lightning App with Relevant Tabs**





- **Creating a Field**

Creating a field in Product Object

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Current Stock Level	Current_Stock_Level__c	Number(18, 0)		
Expiry Date	Expiry_Date__c	Date		
Last Modified By	LastModifiedById	Lookup(User)		
Minimum Stock Level	Minimum_Stock_Level__c	Number(18, 0)		
Owner	OwnerId	Lookup(User,Group)		
Product Description	Product_Description__c	Text Area(255)		
Product ID	Name	Text(80)		
Product Name	Product_Name__c	Text(255)		
Unit Price	Unit_Price__c	Currency(16, 2)		

Creating a field in Purchase Order

The screenshot shows the Salesforce Object Manager interface for the Purchase Order object. The left sidebar lists various setup options like Page Layouts, Lightning Record Pages, and Field Sets. The main content area is titled 'Fields & Relationships' and displays 11 items, sorted by Field Label. The table columns include FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and IN USE. The fields listed are:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	IN USE
Actual Delivery Date	Actual_Delivery_Date__c	Date		✓
Create Purchase Order Name	Name	Text(80)		✓
Created By	CreatedBy	Lookup(User)		✓
Expected Delivery Date	Expected_Delivery_Date__c	Date		✓
Last Modified By	LastModifiedBy	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	Purchase_Order_ID__c	Text(255)		✓
Supplier ID	Supplier_ID__c	Lookup(Supplier)		✓

This screenshot shows the same Salesforce Object Manager interface for the Purchase Order object, but it includes a new field at the bottom of the list: 'Total Order Cost'. The 'IN USE' column for this field also contains a checkmark, indicating it is active. The rest of the fields and their properties remain the same as in the first screenshot.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	IN USE
Create Purchase Order Name	Name	Text(80)		✓
Created By	CreatedBy	Lookup(User)		✓
Expected Delivery Date	Expected_Delivery_Date__c	Date		✓
Last Modified By	LastModifiedBy	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	Purchase_Order_ID__c	Text(255)		✓
Supplier ID	Supplier_ID__c	Lookup(Supplier)		✓
Total Order Cost	Total_Order_Cost__c	Currency(16, 2)		✓

Creating a field in Order Item Object

The screenshot shows the Salesforce Object Manager Fields & Relationships page for the Order Item object. The left sidebar lists various setup categories like Page Layouts, Lightning Record Pages, and Field Sets. The main content area displays a table of fields:

Fields & Relationships				
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Amount	Amount__c	Formula (Currency)		
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Order Cost	Order_Cost__c	Formula (Currency)		
Order Item ID	Order_Item_ID__c	Text(18)		
Order Item Name	Name	Text(80)		✓
Product	Product__c	Lookup(Product)		✓
Product ID	Product_ID__c	Master-Detail(Product)		✓
Purchase Order ID	Purchase_Order_ID__c	Master-Detail(Purchase Order)		✓

The screenshot shows the Salesforce Object Manager Fields & Relationships page for the Order Item object. The left sidebar lists various configuration categories: Details, Fields & Relationships (selected), 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 displays a table titled "Fields & Relationships" with 12 items, sorted by Field Label. Each row contains three columns: the field name, its label, and its type. A "Quick Find" search bar is at the top right of the table. A "Field Dependencies" button is also present.

	Field Label	Type	Dependencies
Order Cost	Order_Cost__c	Formula (Currency)	
Order Item ID	Order_Item_ID__c	Text(18)	
Order Item Name	Name	Text(80)	✓
Product	Product__c	Lookup(Product)	✓
Product ID	Product_ID__c	Master-Detail(Product)	✓
Purchase Order ID	Purchase_Order_ID__c	Master-Detail(Purchase Order)	✓
Quantity Ordered	Quantity_Ordered__c	Number(18, 0)	
Quantity Received	Quantity_Received__c	Number(18, 0)	
Unit Price	Unit_Price__c	Formula (Currency)	

Creating a field in Inventory Transaction

The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes tabs for 'Welcome to Salesforce: Reset y', 'Recently Viewed | Products | S', 'App Manager | Salesforce', 'Inventory Transaction | Salesforce', and 'Student'. Below the navigation is a search bar labeled 'Search Setup'.

The main content area is titled 'SETUP > OBJECT MANAGER' and 'Inventory Transaction'. On the left, a sidebar lists various setup categories under 'Fields & Relationships'. The right side displays a table titled 'Fields & Relationships' with 9 items, sorted by Field Label. The columns in the table are FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		✓
Inventory Transaction Name	Name	Text(80)		✓
Last Modified By	LastModifiedById	Lookup(User)		✓
Owner	OwnerId	Lookup(User/Group)		✓
Purchase Order ID	Purchase_Order_ID__c	Lookup(Purchase Order)		✓
Total Order Cost	Total_Order_Cost__c	Formula (Currency)		✓
Transaction Date	Transaction_Date__c	Date		✓
Transaction ID	Transaction_ID__c	Text(18)		✓
Transaction Type	Transaction_Type__c	Picklist		✓

Creating a field in Supplier Object

The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes tabs for 'Welcome to Salesforce: Reset y', 'Recently Viewed | Products | S', 'App Manager | Salesforce', 'Supplier | Salesforce', and 'Student'. Below the navigation is a search bar labeled 'Search Setup'.

The main content area is titled 'SETUP > OBJECT MANAGER' and 'Supplier'. On the left, a sidebar lists various setup categories under 'Fields & Relationships'. The right side displays a table titled 'Fields & Relationships' with 9 items, sorted by Field Label. The columns in the table are FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Address	Address__c	Text Area(255)		✓
Contact Person	Contact_Person__c	Text(18)		✓
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(18)		✓
Supplier Name	Name	Text(80)		✓

- **Editing a Page Layout in Objects**

Welcome to Salesforce: Reset your password

Recently Viewed | Products | Setup | App Manager | Salesforce | Product | Salesforce | Student

orgfarm-c263fdb71-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgK000001yehy/PageLayouts/00hgK000006AwYQAU/view

Setup Home Object Manager

SETUP > OBJECT MANAGER Product

Product

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

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

Fields Quick Find Field Name

Section Expiry Date Last Modified By Product Description

Blank Space Created By Minimum Stock Level Product Name

Created By Current Stock Level Owner Unit Price

Product Detail Standard Buttons Edit Delete Close Change Owner Change Record Type Printable View Sharing Sharing Hierarchy Edit Labels

Information (Header visible on edit only)

Product ID Sample Text

Product Name Sample Text

Product Description Sample Text

Unit Price \$123.45

Current Stock Level 61,750

Minimum Stock Level 23,892

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)

Mobile Cards (Salesforce mobile only)

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

Welcome to Salesforce: Reset your password

Recently Viewed | Products | Setup | App Manager | Salesforce | Purchase Order | Salesforce | Student

orgfarm-c263fdb71-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgK000001yDXR/PageLayouts/00hgK000006IMUsQAM/view

Setup Home Object Manager

SETUP > OBJECT MANAGER Purchase Order

Purchase Order

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

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

Fields Quick Find Field Name

Section Create Purchase Order Order Date Total Order Cost

Blank Space Expected Delivery Date Owner

Actual Delivery Date Last Modified By Purchase Order ID

Created By Order Count Supplier ID

Purchase Order Detail Standard Buttons Edit Delete Close Change Owner Change Record Type Printable View Sharing Sharing Hierarchy Edit Labels

Information (Header visible on edit only)

Purchase Order ID Sample Text

Supplier ID Sample.Text

Order Date 9/5/2025

Expected Delivery Date 9/5/2025

Create Purchase Order Name Sample.Text

Actual Delivery Date 9/5/2025

Order Count 30,371

Total Order Cost \$123.45

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)

Mobile Cards (Salesforce mobile only)

Welcome to Salesforce: Reset your password

Recently Viewed | Products | Setup | App Manager | Salesforce | Order Item | Salesforce | Student

orgfarm-c263fdb71-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgK000001ymaf/PageLayouts/00hgk000006UdGQAU/view

Setup Home Object Manager

SETUP > OBJECT MANAGER
Order Item

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

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

Fields Quick Find Field Name

Section Last Modified By Product Quantity Received

Blank Space Order Cost Product ID Unit Price

Amount Order Item ID Purchase Order ID

Created By Order Item Name Quantity Ordered

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

Purchase Order ID Sample Text
Quantity Ordered 71,538
Quantity Received 26,137

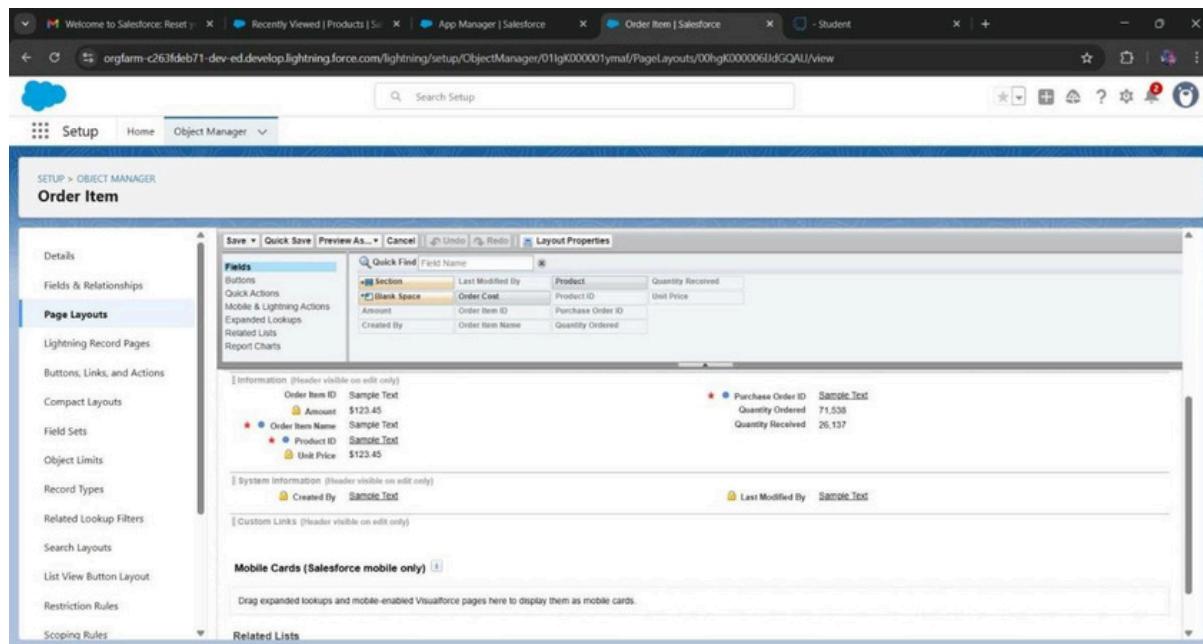
Created By Sample Text Last Modified By Sample Text

System Information (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.

Related Lists



Welcome to Salesforce: Reset your password

Recently Viewed | Products | Setup | App Manager | Salesforce | Inventory Transaction | Salesforce | Student

orgfarm-c263fdb71-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgK000001ymdt/PageLayouts/00hgk000006IN90QAE/view

Setup Home Object Manager

SETUP > OBJECT MANAGER
Inventory Transaction

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

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

Fields Quick Find Field Name

Section Last Modified By Transaction Date

Blank Space Owner Transaction ID

Created By Purchase Order ID Transaction Type

Inventory Transaction Total Order Cost

Actions in the Salesforce Classic Publisher section, and have saved the layout, then this section inherits that set of actions by default when you click to override.

Inventory Transaction Detail Standard Buttons Edit Delete Close Change Owner Change Record Type Printable View Sharing Sharing Hierarchy Edit Labels

Information (Header visible on edit only)

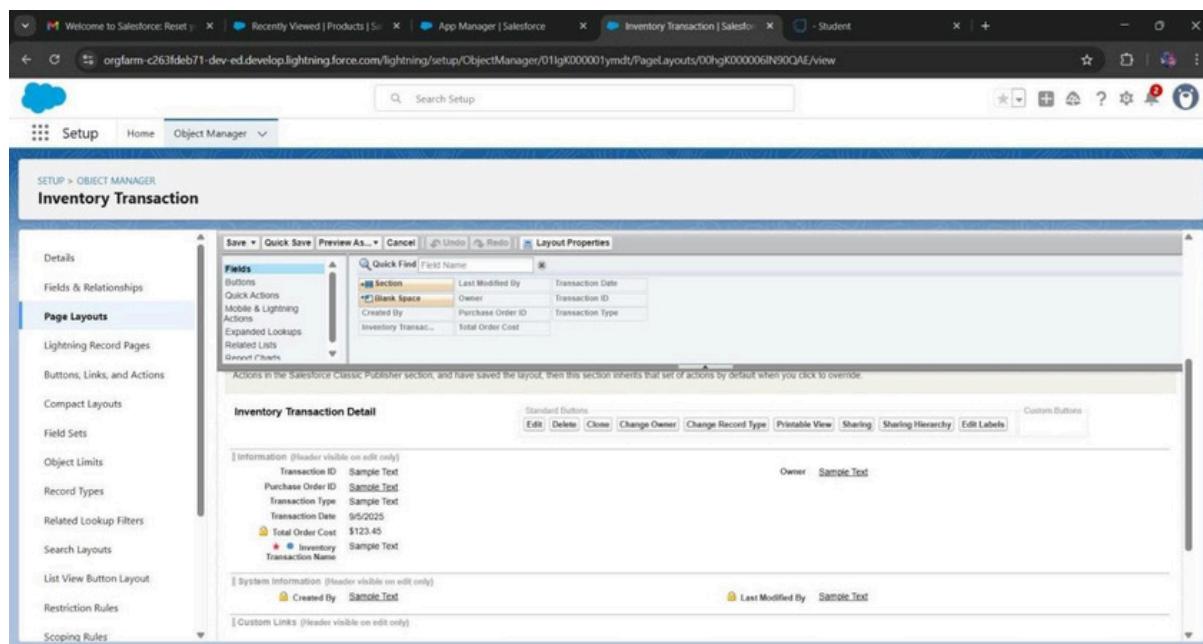
Transaction ID Sample Text
Purchase Order ID Sample Text
Transaction Type Sample Text
Transaction Date 9/5/2025
Total Order Cost \$123.45
Inventory Transaction Name Sample Text

Owner Sample Text

Created By Sample Text Last Modified By Sample Text

System Information (Header visible on edit only)

Custom Links (Header visible on edit only)



SETUP > OBJECT MANAGER
Supplier

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

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 Created By Phone Number
Blank Space Email Supplier ID
Address Last Modified By Supplier Name
Contact Person Owner

Actions in the Salesforce Classic Publisher section, and have saved the layout, then this section inherits that set of actions by default when you click to override.

Supplier Detail

Standard Buttons: Edit Delete Close Change Owner Change Record Type Printable View Sharing Sharing Hierarchy Edit Labels

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):

Mobile Cards (Salesforce mobile only)

- **Creating a Compact Layout**

SETUP > OBJECT MANAGER
Product

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

Product Compact Layout

Save Cancel

Enter Compact Layout Information

Label: Product Compact Layout
Name: Product_Compact_Layout

Select Compact Layout Fields

Available Fields: Created By, Expiry Date, Last Modified By, Minimum Stock Level, Owner, Product ID

Selected Fields: Product Name, Unit Price, Current Stock Level

Add Remove Top Up Down Bottom

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

Save Cancel

The screenshot shows the 'Purchase Order Compact Layout' configuration page in the Salesforce Setup. The left sidebar lists various setup options like Details, Fields & Relationships, Page Layouts, etc. The 'Compact Layouts' section is selected. The main area shows the 'Edit Purchase Order Compact Layout' screen with a 'Purchase Order Compact Layout' title. It includes a 'Compact Layout Edit' form with fields for Label ('Purchase Order Compact L.') and Name ('Purchase_Order_Compact'). Below this is a 'Select Compact Layout Fields' section with two panels: 'Available Fields' (listing fields like Actual Delivery Date, Created By, etc.) and 'Selected Fields' (listing fields like Purchase Order ID, Order Date, Total Order Cost, Supplier ID). A note at the bottom says 'Use SHIFT + click to select adjacent fields. Use CTRL + click to select an assortment of fields.'

• Creating a Validation Rules

The screenshot shows the 'Validation Rule Edit' configuration page for a Purchase Order. The left sidebar lists various setup options. The main area shows the 'Validation Rule Edit' screen with a 'Rule Name' field set to 'Expected_Delivery_Date_Validation'. The 'Active' checkbox is checked. The 'Description' field is empty. The 'Error Condition Formula' section contains the formula '(Expected_Delivery_Date__c - Order_Date__c) > 7'. A 'Functions' sidebar on the right lists various mathematical functions like ABS, ACOS, ADOMONTHS, AND, ASCII, ASIN, etc. A note at the top right says 'Quick Tips'.

Purchase Order

If this formula expression is true, display the text defined in the Error Message area

(Expected_Delivery_Date__c - Order_Date__c) > 7

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

Error Message

Example: Discount percent cannot exceed 30%

This message will appear when Error Condition formula is true.

Error Message: The Expected Delivery Date should not exceed 7 days.

This error message can either appear at the top of the page or below a specific field on the page.

Error Location: Top of Page Field

Save Save & New Cancel

• Creating a Profiles

Create an Inventory Manager Profile

Profiles

Inventory Manager

Set the permissions and page layouts for this profile.

Profile Edit

Name	Save	Save & New	Cancel
Inventory Manager			
User License	Salesforce		
Description			

Custom App Settings

App	Visible	Default	App	Visible	Default
All Tabs (standard__AllTabSet)	<input checked="" type="checkbox"/>	<input type="radio"/>	My Service Journey (standard__MSJapp)	<input checked="" type="checkbox"/>	<input type="radio"/>
Analytics Studio (standard__Insights)	<input checked="" type="checkbox"/>	<input type="radio"/>	Queue Management (standard__QueueManagement)	<input checked="" type="checkbox"/>	<input type="radio"/>
App Launcher (standard__AppLauncher)	<input checked="" type="checkbox"/>	<input type="radio"/>	Sales (standard__Lightning_Sales)	<input checked="" type="checkbox"/>	<input type="radio"/>
Approvals (standard__Approvals)	<input checked="" type="checkbox"/>	<input type="radio"/>	Sales (standard__Sales)	<input checked="" type="checkbox"/>	<input type="radio"/>
Automation (standard__FlowsApp)	<input checked="" type="checkbox"/>	<input type="radio"/>	Sales Cloud Mobile (standard__SalesCloudMobile)	<input checked="" type="checkbox"/>	<input type="radio"/>
Bolt Solutions (standard__LightningBolt)	<input checked="" type="checkbox"/>	<input type="radio"/>	Sales Console (standard__Lightning_SalesConsole)	<input checked="" type="checkbox"/>	<input type="radio"/>
Community (standard__Community)	<input checked="" type="checkbox"/>	<input type="radio"/>	Salesforce Chatter (standard__Chatter)	<input checked="" type="checkbox"/>	<input type="radio"/>

Welcome to Salesforce: Reset

Recently Viewed | Products | Setup | Profiles | Salesforce

Student

orgfarm-c263ldeb71-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00egK000004huiz%2Fe%3fretURL%3D%252F00e%253Fc%253D00BgK00000DedzT%...

Search Setup

Setup Home Object Manager

Q pr

SETUP Profiles

Bolt Solutions (standard_LightningBolt)

Community (standard_Community)

Content (standard_Content)

Data Cloud (standard_AudienceXMP)

Data Manager (standard_DataManager)

Digital Experiences (standard_SalesforceCMS)

Lightning Usage App (standard_LightningUsageApp)

Marketing CRM Classic (standard_Marketing)

Medical Inventory Management (clone) (Medical_Inventory_Management_clone)

Medical Inventory Management (Medical_Inventory_Management)

Sales Console (standard_LightningConsole)

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)

Service Provider Access

Tab Settings

Overwrite users' personal tab customizations

Standard Tab Settings

Home Default On

Accounts Default On

Activations Default On

Inventory Count Plan Items Default On

Inventory Count Product Batch Items Default On

Inventory Item Reservations Default On

Hyperforce Assistant

Users Profiles

Data Mass Transfer Approval Requests

Feature Settings Approval Settings

Data.com Prospector Preferences Prospector Users

Functions

Marketing Lead Processes

Sales Products Asset Settings Product Schedules

Welcome to Salesforce: Reset

Recently Viewed | Products | Setup | Profiles | Salesforce

Student

orgfarm-c263ldeb71-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00egK000004huiz%2Fe%3fretURL%3D%252F00e%253Fc%253D00BgK00000DedzT%...

Search Setup

Setup Home Object Manager

Q pr

SETUP Profiles

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	Edit	Delete	View All Records	Modify All Records	View All Fields
Inventory Transactions	<input checked="" type="checkbox"/>													
Order Items	<input checked="" type="checkbox"/>													
Products	<input checked="" type="checkbox"/>													
Purchase Orders	<input checked="" type="checkbox"/>													
Suppliers	<input checked="" type="checkbox"/>													

Session Settings

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login: None

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

Hyperforce Assistant

Users Profiles

Data Mass Transfer Approval Requests

Feature Settings Approval Settings

Data.com Prospector Preferences Prospector Users

Functions

Marketing Lead Processes

Sales Products Asset Settings Product Schedules

Create a Purchase Manager Profile

The screenshot shows the Salesforce Setup interface with the 'Profiles' tab selected. A new profile named 'Purchase Manager' is being created. The 'Custom Profile' checkbox is checked. Under 'Custom App Settings', several tabs are listed with checkboxes for 'Visible' and 'Default'. The visible tabs include All Tabs, Analytics Studio, App Launcher, Approvals, Automation, Bolt Solutions, My Service Journey, Queue Management, Sales, Sales Cloud Mobile, and Sales Console.

Tab	Visible	Default
All Tabs (standard__AllTabSet)	<input checked="" type="checkbox"/>	<input type="radio"/>
Analytics Studio (standard__Insights)	<input checked="" type="checkbox"/>	<input type="radio"/>
App Launcher (standard__AppLauncher)	<input checked="" type="checkbox"/>	<input type="radio"/>
Approvals (standard__Approvals)	<input checked="" type="checkbox"/>	<input type="radio"/>
Automation (standard__FlowApp)	<input checked="" type="checkbox"/>	<input type="radio"/>
Bolt Solutions (standard__LightningBolt)	<input checked="" type="checkbox"/>	<input type="radio"/>
My Service Journey (standard__MSJApp)	<input checked="" type="checkbox"/>	<input type="radio"/>
Queue Management (standard__QueueManagement)	<input checked="" type="checkbox"/>	<input type="radio"/>
Sales (standard__Sales)	<input checked="" type="checkbox"/>	<input type="radio"/>
Sales Cloud Mobile (standard__SalesCloudMobile)	<input checked="" type="checkbox"/>	<input type="radio"/>
Sales Console (standard__LightningSalesConsole)	<input checked="" type="checkbox"/>	<input type="radio"/>

The screenshot continues the profile configuration. Under 'Service Provider Access', there is a 'Tab Settings' section with checkboxes for 'Overwrite users' personal tab customizations'. Below this are 'Standard Tab Settings' for Accounts, Activations, and Activation Targets, each with dropdown menus for 'Home' and 'Default On'. There are also sections for 'Inventory Count Plan Items', 'Inventory Count Product Batch Items', 'Inventory Item Reservations', and 'Inventory Operations', each with dropdown menus for 'Default On'.

The screenshot shows the Salesforce Setup interface with the 'Profiles' page open. The left sidebar includes sections for Hyperforce Assistant, Users (with 'Profiles' selected), Data (including Mass Transfer Approval Requests), Feature Settings, and Sales (with 'Products' selected). The main content area displays a grid of access rights for various objects: Inventory Transactions, Order Items, Products, Purchase Orders, and Suppliers. Under 'Session Settings', it shows 'Session Times Out After' set to '2 hours of inactivity' and 'Session Security Level Required at Login' set to 'None'. Below this is the 'Password Policies' section, which includes fields for password expiration (Never expires), history (3 passwords remembered), length (6), complexity (Must include alpha and numeric characters), and other security settings like lockout and password resets.

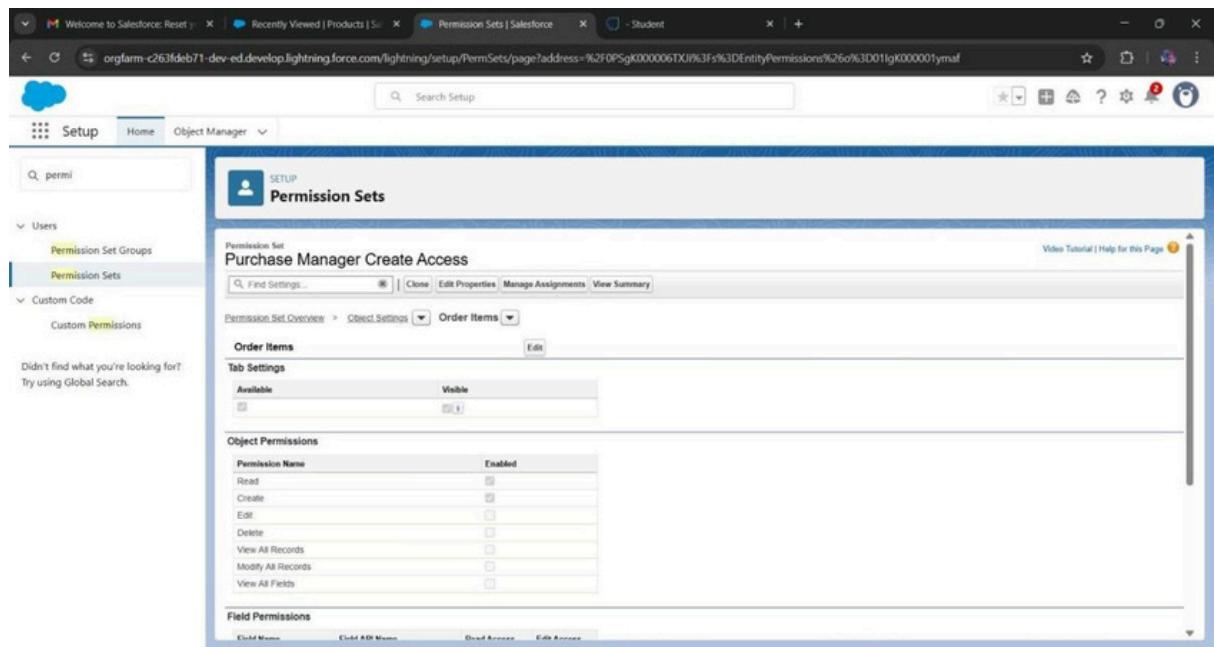
Creating a Roles

The screenshot shows the Salesforce Setup interface with the 'Roles' page open. The left sidebar includes sections for Users (with 'Roles' selected), Feature Settings, Sales (Contact Roles on Contracts, Contact Roles on Opportunities), Service (Case Teams, Case Team Roles), and a search bar for 'rol'. The main content area shows a 'Role Edit' form for a role named 'Purchasing Manager'. The form fields include 'Label' (Purchasing Manager), 'Role Name' (Purchasing_Manager), 'This role reports to' (SVP, Sales & Marketing), and 'Role Name as displayed on reports' (empty field). At the bottom are 'Save', 'Save & New', and 'Cancel' buttons.

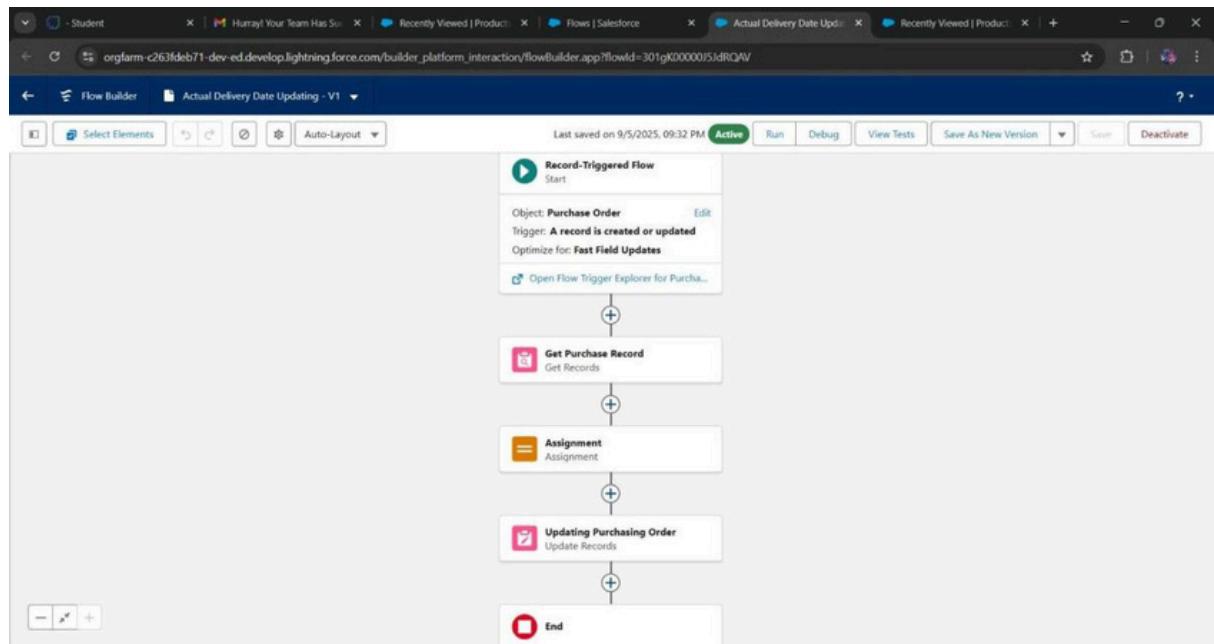
The screenshot shows the Salesforce Setup interface with the 'Roles' page open. The left sidebar navigation includes 'Users' (selected), 'Roles' (highlighted in blue), 'Feature Settings' (with sub-options like Sales, Service, and Case Teams), and a search bar. The main content area displays the 'Role Edit' screen for 'Inventory Manager'. It shows the 'Label' field as 'Inventory Manager' and the 'Role Name' field as 'Inventory_Manager'. Below these, it says 'This role reports to' and lists 'SVP: Sales & Marketing'. There is also a field for 'Role Name as displayed on reports'. At the bottom are 'Save', 'Save & New', and 'Cancel' buttons.

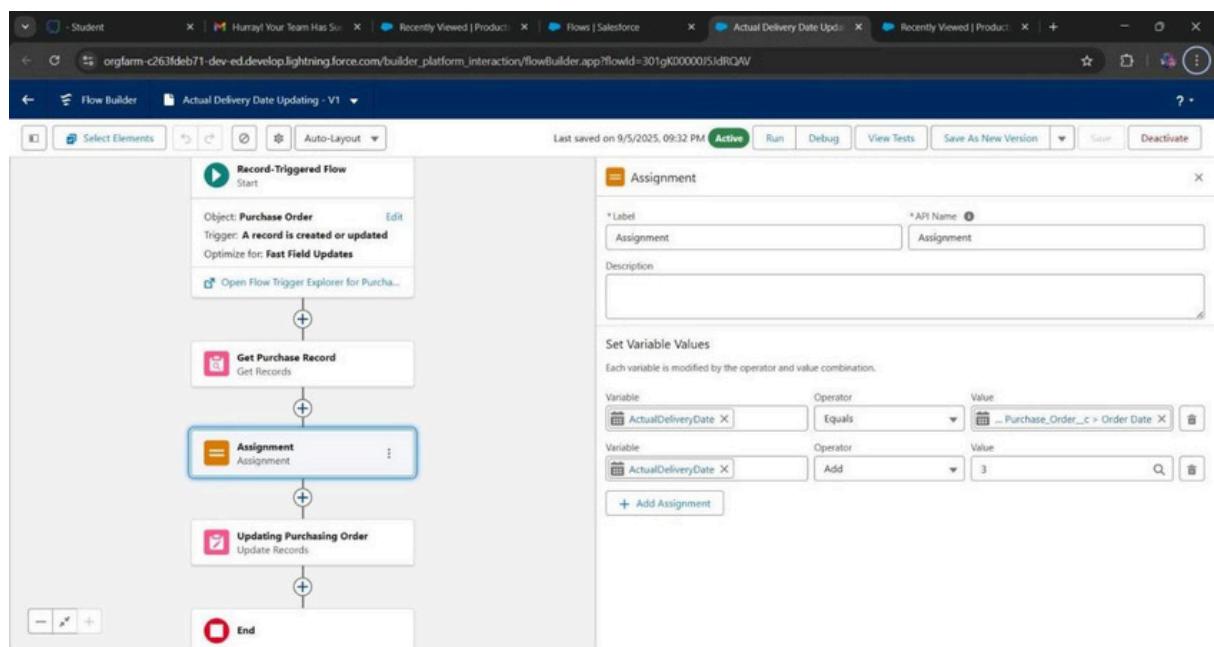
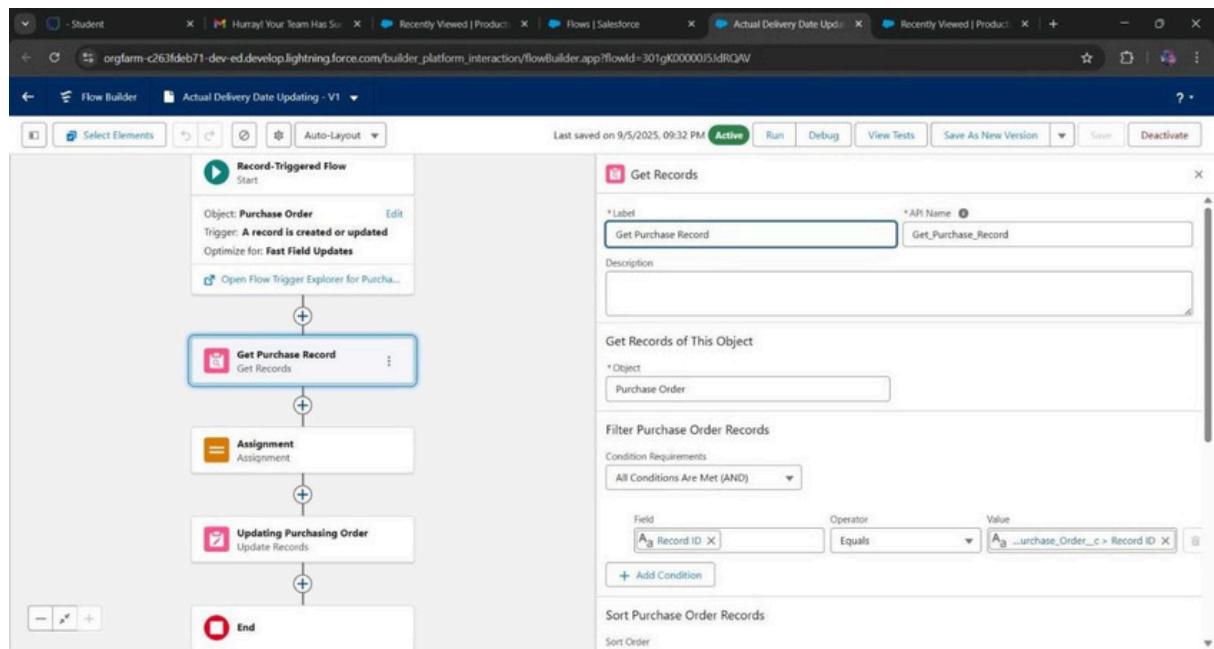
Creating a Permission Set

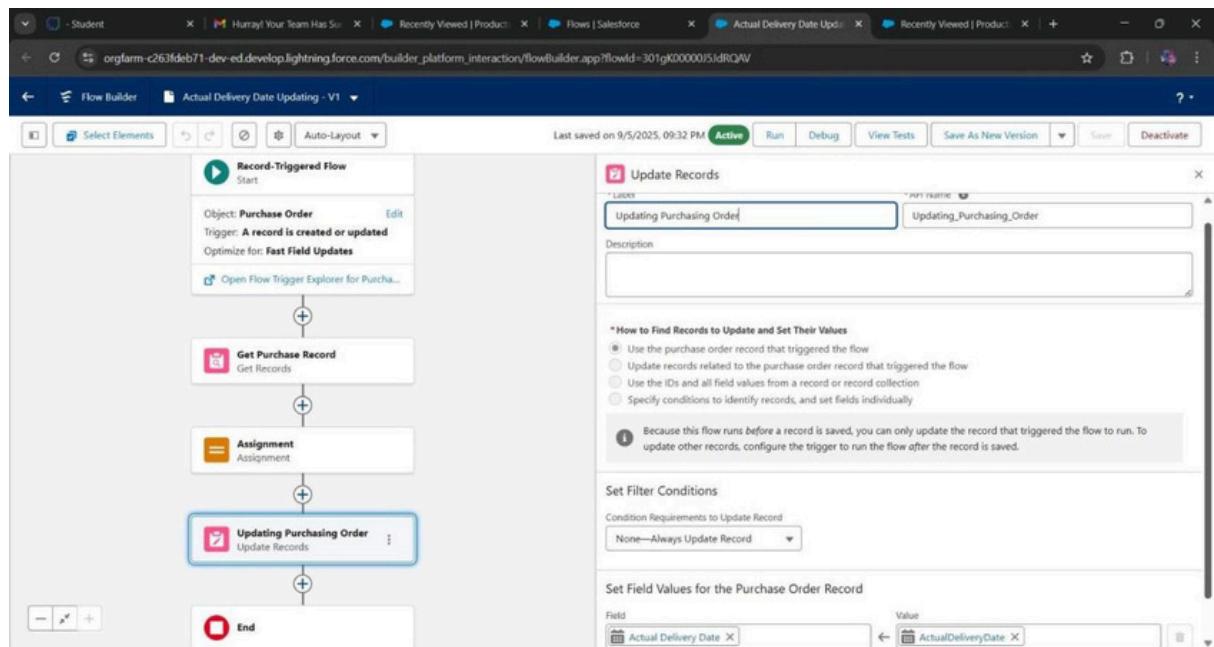
The screenshot shows the Salesforce Setup interface with the 'Permission Sets' page open. The left sidebar navigation includes 'Users' (selected), 'Permission Set Groups' (highlighted in blue), 'Permission Sets' (selected), 'Custom Code', and 'Custom Permissions'. The main content area displays the 'Clone: Purchase Manager Create Access' screen. It asks for a new label and description for the cloned permission set. The 'Enter permission set information' section shows the 'Label' as 'Purchase Manager Create Access' and the 'API Name' as 'Purchase_Manager'. A 'Description' field is present, though empty. Below this, there are checkboxes for 'Session Activation Required' and 'License'. At the bottom are 'Save' and 'Cancel' buttons.



- **Implemented Flow**







- **Creating a Triggers**

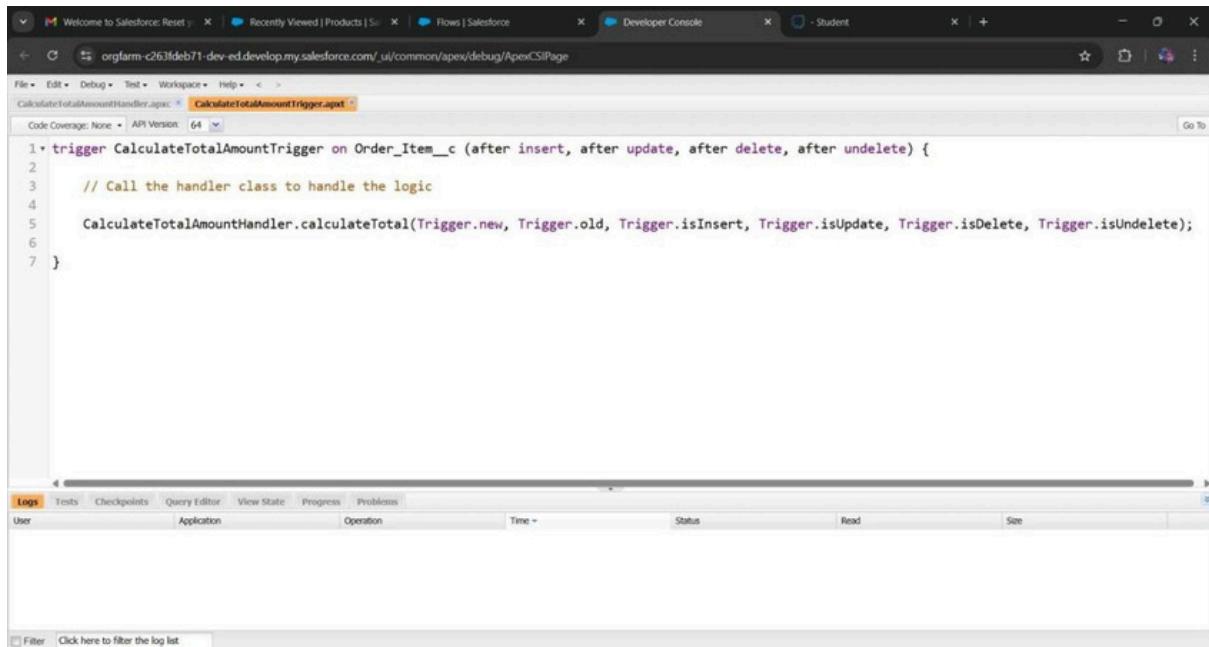
Creating a CalculateTotalAmountHandler

```

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    // Collect Purchase Order IDs affected by changes in Order_Item__c records
11
12    Set<Id> parentIds = new Set<Id>();
13
14
15
16    // For insert, update, and undelete scenarios
17
18

```

Creating a CalculateTotalAmountTrigger



The screenshot shows the Salesforce Developer Console interface. The top navigation bar includes tabs for Welcome to Salesforce, Recently Viewed, Products, Flows, and Developer Console. The main area displays the Apex code for a trigger:

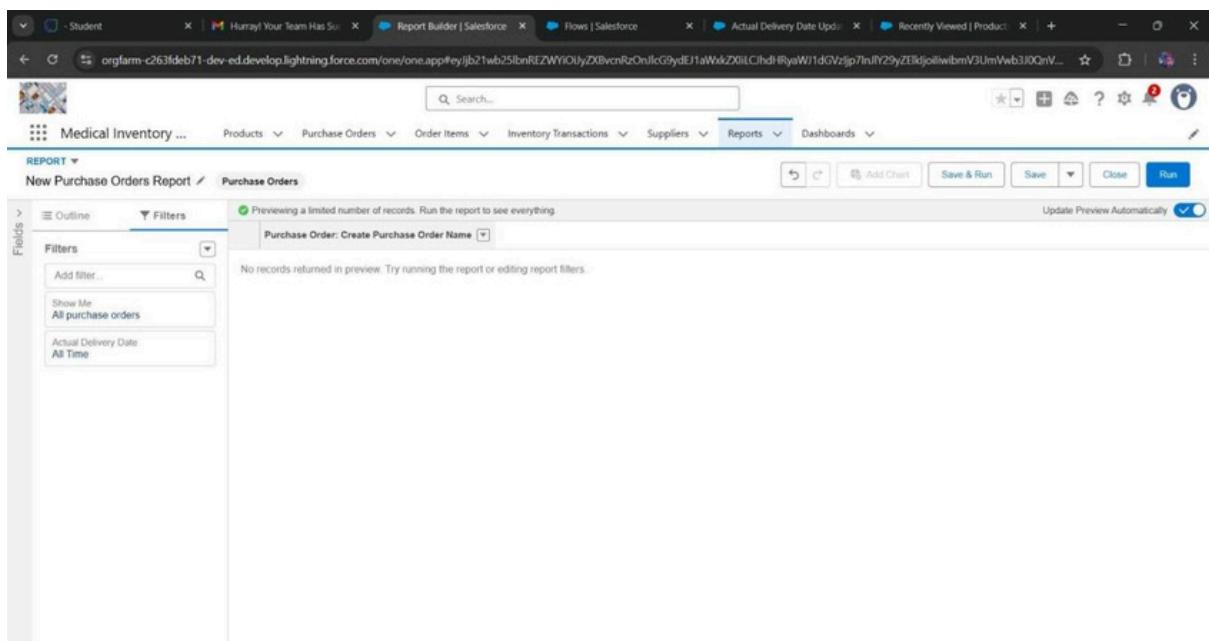
```
1 trigger CalculateTotalAmountTrigger on Order_Item__c (after insert, after update, after delete, after undelete) {
2
3     // Call the handler class to handle the logic
4
5     CalculateTotalAmountHandler.calculateTotal(Trigger.new, Trigger.old, Trigger.isInsert, Trigger.isUpdate, Trigger.isDelete, Trigger.isUndelete);
6
7 }
```

Below the code editor is a log viewer with tabs for Logs, Tests, Checkpoints, Query Editor, View State, Progress, and Problems. The Logs tab is selected, showing a table with columns: User, Application, Operation, Time, Status, Read, and Size. A message is present in the log:

User	Application	Operation	Time	Status	Read	Size
Click here to filter the log list						

- **Creating a Reports**

Creating a Purchase Order Report



The screenshot shows the Salesforce Report Builder interface. The top navigation bar includes tabs for Student, Hurray! Your Team Has Suc..., Report Builder | Salesforce, Flows | Salesforce, Actual Delivery Date Upd..., and Recently Viewed | Product. The main area shows a report titled "Now Purchase Orders Report" under the "Purchase Orders" section. The report has the following configuration:

- REPORT**: Now Purchase Orders Report
- PAGE FIELDS**: Purchase Orders
- FIELDS**:
 - Outline
 - Filters
 - Add filter...
 - Show Me All purchase orders
 - Actual Delivery Date All Time
- PREVIEW**: Previewing a limited number of records. Run the report to see everything.
- Buttons**: Add Chart, Save & Run, Save, Close, Run
- Checkboxes**: Update Preview Automatically (checked)

The preview pane shows the message: "No records returned in preview. Try running the report or editing report filters."

The screenshot shows the Salesforce Report Builder interface. The top navigation bar includes links for Welcome to Salesforce, Recently Viewed, Products, Student, Report Builder, and Reports. The main area is titled "Medical Inventory ...". A sub-menu "REPORT" is open, showing "New Purchase Orders Report". The report preview window displays the following details:

- Fields**:
 - Groups**: Purchase Order ID, Supplier ID.
 - Columns**: Order Count, Total Order Cost.
- Filters**: Purchase Order ID, Supplier ID, Order Count, Total Order Cost.
- Preview Message**: Previewing a limited number of records. Run the report to see everything.
- Run Buttons**: Add Chart, Save & Run, Save, Close, Run.

Creating a Purchase Orders with Order Items and Product ID

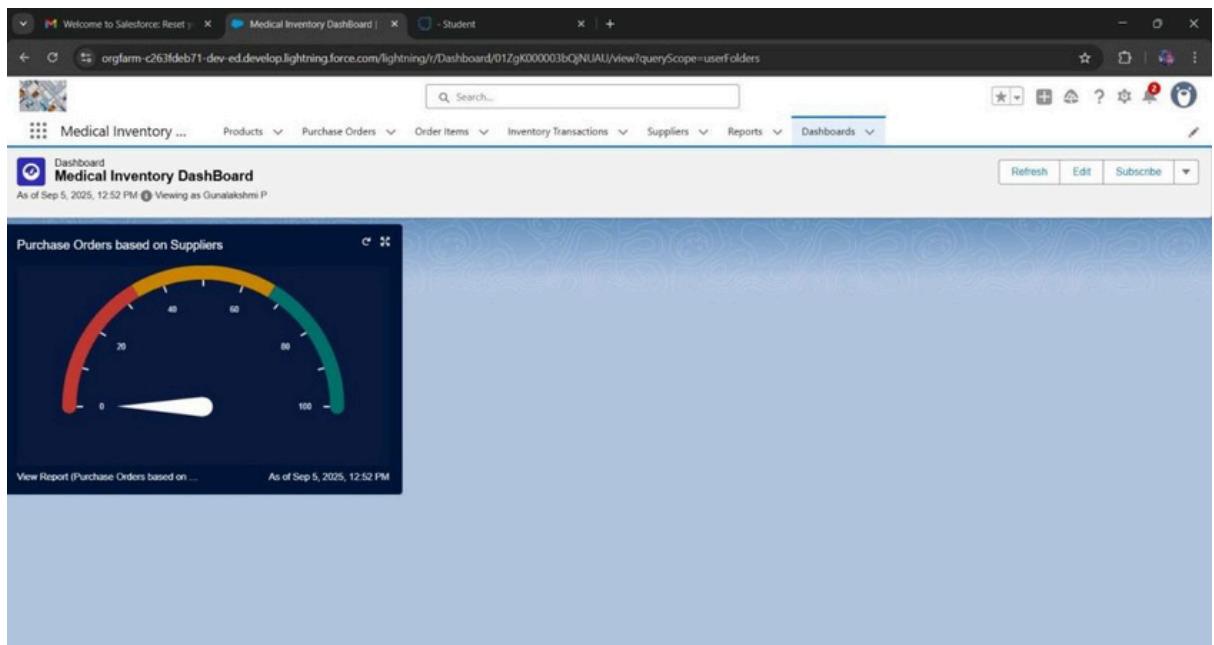
The screenshot shows the Salesforce Report Builder interface. The top navigation bar includes links for Student, Report Builder, and Reports. The main area is titled "Medical Inventory ...". A sub-menu "REPORT" is open, showing "Purchase Orders with Order Items and Products". The report preview window displays the following details:

- Fields**:
 - Filters**: Purchase Order: Create Purchase Order Name, Order Item: Order Item Name, Product ID: Product ID.
- Preview Message**: Previewing a limited number of records. Run the report to see everything.
- Run Buttons**: Add Chart, Save & Run, Save, Close, Run.

The screenshot shows the Salesforce Report Builder interface. At the top, there are tabs for 'Welcome to Salesforce: Reset', 'Recently Viewed | Products | Se...', and 'Report Builder | Salesforce'. The main title is 'Medical Inventory ...' with a dropdown menu. Below the title, there are navigation links for 'Products', 'Purchase Orders', 'Order Items', 'Inventory Transactions', 'Suppliers', 'Reports', and 'Dashboards'. The current view is 'REPORT' under 'New Report'. The report title is 'Purchase Orders with Order Items and Products'. The report preview pane shows a message: 'Previewing a limited number of records. Run the report to see everything.' It lists filters: 'Purchase Order: ID', 'Actual Delivery Date', 'Supplier ID', 'Product ID: Product ID', 'Product ID: Product Name', 'Order Count', 'Quantity Received', and 'Amount'. A note says 'No records returned in preview. Try running the report or editing report filters.' with options 'Show All purchase orders' and 'Edit other filters in the filter panel'. The 'Fields' sidebar shows 'Groups' with 'Purchase Order: ID', 'Actual Delivery Date', and 'Supplier ID'. The 'Columns' sidebar lists 'Product ID: Product ID', 'Product ID: Product Name', 'Order Count', 'Quantity Received', and 'Amount'. At the bottom, there are buttons for 'Row Counts', 'Detail Rows', 'Subtotals', and 'Grand Total', along with a 'Conditional Formatting' link.

- **Creating a Dashboard**

The screenshot shows the Salesforce dashboard editor. The title bar says 'Welcome to Salesforce: Reset' and 'Medical Inventory Dashboard'. The dashboard has a grid layout with several widgets. One prominent widget is a gauge chart titled 'Purchase Orders based on Suppliers' with a scale from 0 to 100. An overlay window titled 'Edit Widget' is open over this chart. Inside the edit window, the 'Report' section is set to 'Purchase Orders based on Supplier'. The 'Display As' section shows various visualization options, and the 'Mode' section is set to 'Standard'. The 'Measure' section is set to 'Sum of Order Count'. At the bottom of the edit window are 'Cancel' and 'Update' buttons. The background shows other parts of the dashboard and the Salesforce header.



RESULT:

Tabs

The screenshot shows the Salesforce Setup page under the "Custom Tabs" tab. The left sidebar includes "Setup", "Home", and "Object Manager". The main content area has a title "Custom Tabs" with a sub-instruction: "You can create new custom tabs to extend Salesforce functionality or to build new application functionality." Below this, there are three sections: "Custom Object Tabs", "Web Tabs", and "Visualforce Tabs".

- Custom Object Tabs:** This section lists five tabs:

Action	Label	Tab Style	Description
Edit Del	Inventory Transactions	Alarm clock	
Edit Del	Order Items	Bell	
Edit Del	Products	Stethoscope	
Edit Del	Purchase Orders	Airplane	
Edit Del	Suppliers	Balls	
- Web Tabs:** This section states "No Web Tabs have been defined".
- Visualforce Tabs:** This section states "No Visualforce Tabs have been defined".

Lightning App

The screenshot shows the 'Lightning Experience App Manager' page within the Salesforce Setup interface. The left sidebar includes links like 'Setup Home', 'Service Setup Assistant', 'Commerce Setup Assistant', 'Field Service Setup Home (Beta)', 'Hyperforce Assistant', 'Release Updates', 'Salesforce Mobile App', 'Lightning Usage', 'Optimizer', 'Sales Cloud Everywhere', 'ADMINISTRATION' (with 'Users', 'Data', 'Email' sub-links), and 'PLATFORM TOOLS' (with 'Subscription Management' sub-link). The main content area displays a table titled 'Lightning Experience App Manager' with 28 items. The columns are: App Name, Developer Name, Description, Last Modified, App Type, and Version. The table lists various apps such as Analytics Studio, App Launcher, Approvals, Automation, Bolt Solutions, Community, Content, Data Cloud, Data Manager, Digital Experiences, Lightning Usage App, Marketing CRM Classic, and Medical Inventory Management.

Records

The screenshot shows the 'Reports' page in the Salesforce Lightning Experience interface. The left sidebar includes links for 'Products', 'Purchase Orders', 'Order Items', 'Inventory Transactions', 'Suppliers', 'Reports' (selected), and 'Dashboards'. The main content area displays a table titled 'Recent' with 2 items. The columns are: Report Name, Description, Folder, Created By, Created On, and Subscribed. The items listed are 'Complete Purchase Details Report' (in Private Reports folder, created by Gunalakshmi P on 9/5/2025, 10:39 AM) and 'Purchase Orders based on Suppliers' (in Private Reports folder, created by Gunalakshmi P on 9/5/2025, 10:11 AM). The sidebar also shows sections for 'RECENT', 'FOLDERS', and 'FAVORITES'.

CONCLUSION :

Effective medical inventory management is a necessity, not a luxury, for modern healthcare facilities, as it directly impacts patient care, operational efficiency, and financial health.

