

# MEDICAL INVENTORY MANAGEMENT

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## 1.INTRODUCTION

### 1.1 Project Overview

The **Medical Inventory Management System** is a Salesforce-based application designed to streamline and manage various operational aspects of medical inventory. The system enables organizations to efficiently maintain supplier details, manage purchase orders, track product details and transactions, and monitor product expiry.

## Supplier management

- Add supplier
- Maintain records

## Product management

- Add product
- Track stock
- Monitor expiry

## Purchase orders

- Create purchase orders
- Approval process
- Update status

## Transactions

- Purchase entry
- Issue entry
- Auto update stock

## Automation

- Flows
- Validation rules
- Triggers
- Scheduler

## Reports&Alerts

- Email alerts
- inventory report
- supplier report

## 1.2 Purpose

The purpose of the **Medical Inventory Management System** is to streamline the management of suppliers, products, and purchase orders in a centralized platform. It helps track stock levels, monitor expiry dates, and automate alerts to ensure accuracy and efficiency. This reduces manual effort and improves decision-making for medical organizations.

## 2. DEVELOPMENT PHASE

### Creating developer account:

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

The screenshot shows the sign-up page for the Salesforce Developer Edition. The page has a dark blue header with the Salesforce logo and a light blue sidebar on the left. The main content area features a large heading: "Build enterprise-quality apps fast and get hands-on with Agentforce and Data Cloud." Below this, there's a "Sign up for your Developer Edition" button and a list of benefits with checkmarks. The form itself is titled "Sign up for your Developer Edition" and includes fields for First name (Narmatha), Last name (S), Job title (developer), Work email (snarmatha737@gmail.com), Company (Michael job college), and Country/Region (India). A note at the bottom states: "Your org may be provisioned on or migrated to Hyperforce, Salesforce's public cloud infrastructure." At the bottom right, there's a checkbox for agreeing to the Main Services Agreement and Program Agreement, with a note that the Developer Edition includes AI features and may limit their use.

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

**Sign up for your Developer Edition**

A free Salesforce Platform environment with Agentforce and Data Cloud

First name  Last name

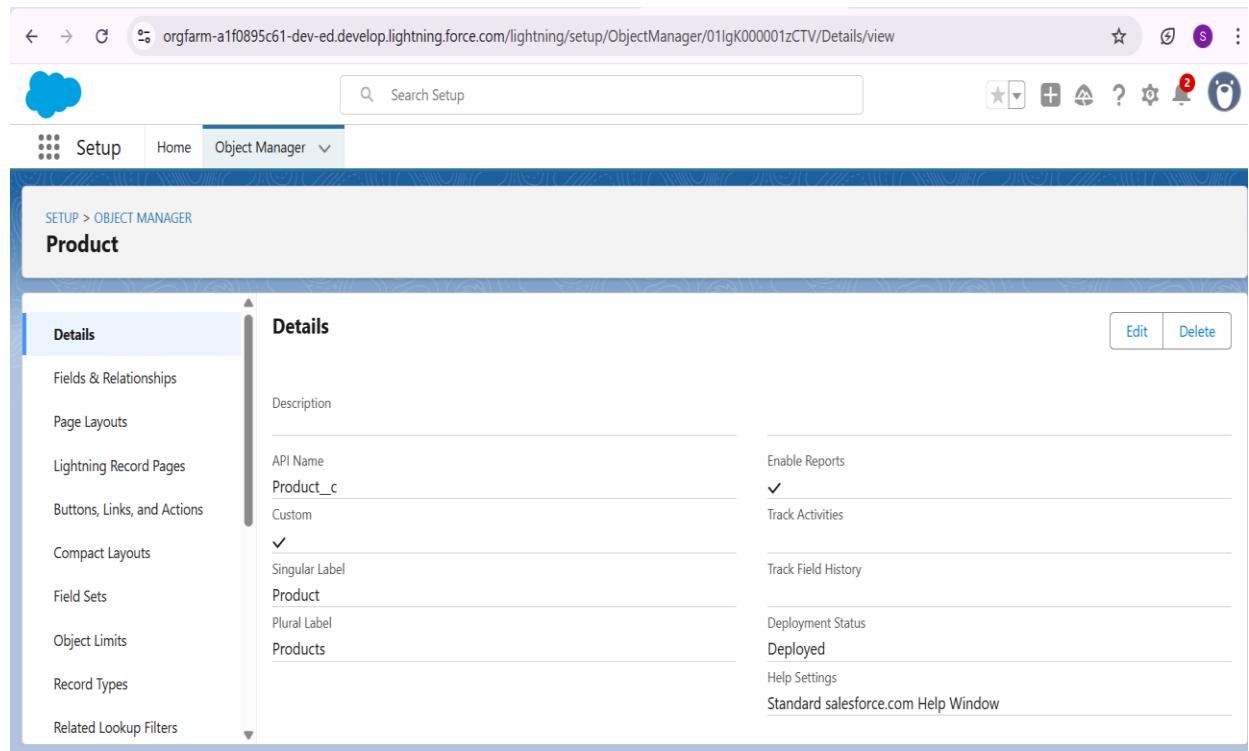
Job title  Work email

Company  Country/Region

Your org may be provisioned on or migrated to Hyperforce, Salesforce's public cloud infrastructure.

I agree to the Main Services Agreement – Developer Services and Salesforce Program Agreement. I acknowledge, as described in the Developer Documentation: (1) the Developer Edition includes autonomous and other generative AI features; and (2) Salesforce may limit use of those features and the org, and may terminate any org that has been inactive for 45 days.

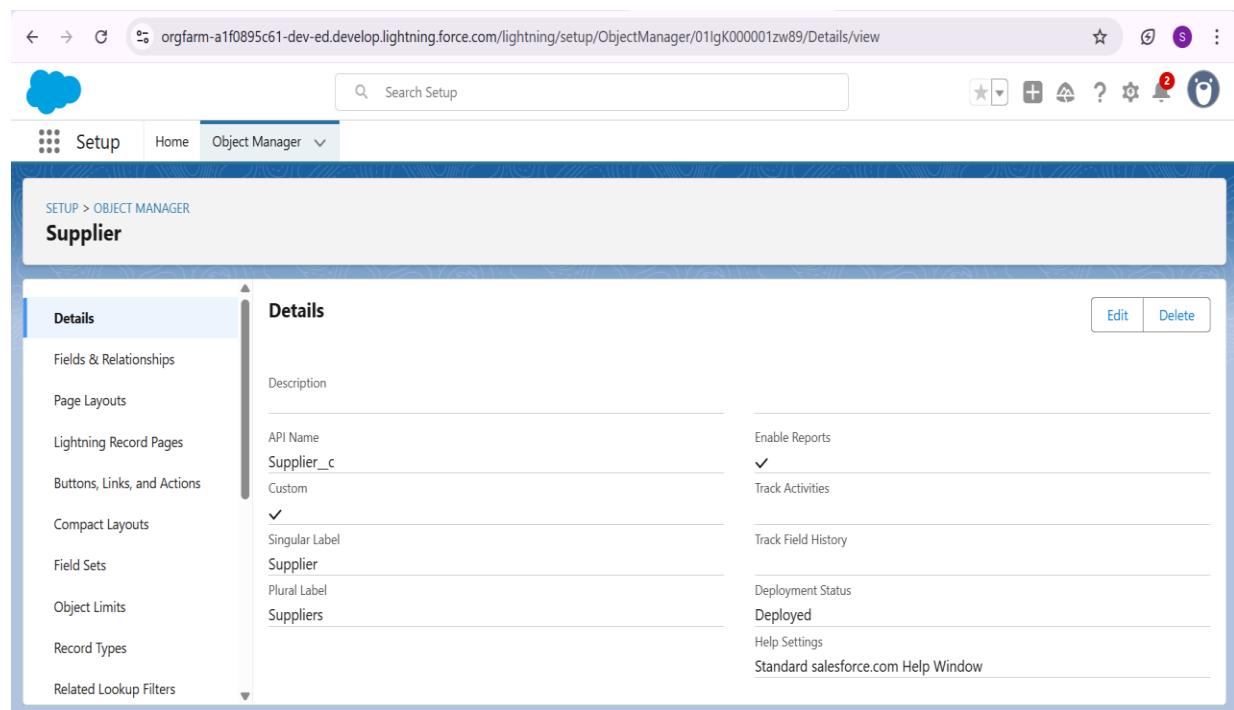
- Created custom objects: Supplier, Product, Purchase Order, Transaction.



The screenshot shows the Salesforce Object Manager interface for the 'Product' custom object. The left sidebar lists various setup options: Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, and Related Lookup Filters. The main details pane shows the following configuration:

Details	
Description	
API Name	Product_c
Custom	✓
Singular Label	Product
Plural Label	Products
Enable Reports	✓
Track Activities	
Track Field History	
Deployment Status	Deployed
Help Settings	Standard salesforce.com Help Window

Buttons at the top right of the details pane are 'Edit' and 'Delete'.



The screenshot shows the Salesforce Object Manager interface for the 'Supplier' custom object. The left sidebar lists various setup options: Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, and Related Lookup Filters. The main details pane shows the following configuration:

Details	
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 of the details pane are 'Edit' and 'Delete'.

The screenshot shows the Salesforce Setup interface for managing objects. The top navigation bar includes links for Home, Object Manager, and a search bar labeled "Search Setup". The main title is "Purchase Order" under the "SETUP > OBJECT MANAGER" section. On the left, a sidebar lists various configuration options: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, and Related Lookup Filters. The main content area is titled "Details" and contains fields for API Name (set to "Purchase\_Order\_\_c"), Singular Label ("Purchase Order"), Plural Label ("Purchase Orders"), and several checkboxes for object settings like "Enable Reports" (checked), "Track Activities", "Track Field History", and "Deployment Status" (set to "Deployed"). There is also a link to "Help Settings" and "Standard salesforce.com Help Window".

This screenshot shows the "Inventory Transaction" object setup page. The structure is identical to the Purchase Order page, with a sidebar on the left and a "Details" tab on the right. The API Name is set to "Inventory\_Transaction\_\_c", and the Singular Label is "Inventory Transaction". The Plural Label is "Inventory Transactions". The "Enable Reports" checkbox is checked. Other settings include "Track Activities", "Track Field History", "Deployment Status" (set to "Deployed"), and links to "Help Settings" and "Standard salesforce.com Help Window".

- Created tabs for all objects for easy navigation.

The screenshot shows the Salesforce Setup interface with the 'Tabs' section selected. The left sidebar has sections like 'Feature Settings' (Analytics, Tableau), 'User Interface' (Console Settings, Tabs), and 'Didnt find what you're looking for? Try using Global Search.' The main content area displays 'Custom Object Tabs' with the following data:

Action	Label	Tab Style	Description
Edit   Del	Inventory Transactions	Treasure chest	
Edit   Del	Order Items	Balls	
Edit   Del	Products	Stethoscope	
Edit   Del	Purchase Orders	Box	
Edit   Del	Suppliers	Hands	

Below this are sections for 'Web Tabs' (No Web Tabs have been defined) and 'Visualforce Tabs' (No Visualforce Tabs have been defined).

- Built a Lightning App including Supplier, Product, Purchase Order, and Transaction tabs.

The screenshot shows a custom Lightning App with the following tabs at the top: Products, Purchase Orders, Order Items, Inventory Transactions, Suppliers, Reports, and Dashboards. The 'Products' tab is currently active. Below the tabs, there's a header with a user icon, a search bar, and several buttons: New, Import, Change Owner, and Assign Label. A sub-header indicates '0 items • Updated a few seconds ago'. The main content area features a blue-toned illustration of industrial structures like tanks and pipes against a cloudy sky.

- Added custom fields to objects.

**Product**

**Field Information**

Field Label	Product Name	Object Name	Product
Field Name	Product_Name	Data Type	Text
API Name	Product_Name_c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Narmatha_S, 9/3/2025, 1:00 AM	Modified By	Narmatha_S, 9/3/2025, 1:00 AM

**General Options**

Required	<input checked="" type="checkbox"/>
Unique	<input type="checkbox"/>
Case Sensitive	<input type="checkbox"/>
External ID	<input type="checkbox"/>
Default Value	

**Custom Field Definition**

**Field Information**

Field Label	Current Stock Level	Object Name	Product
Field Name	Current_Stock_Level	Data Type	Number
API Name	Current_Stock_Level_c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Narmatha_S, 9/3/2025, 1:07 AM	Modified By	Narmatha_S, 9/3/2025, 1:07 AM

**General Options**

Required	<input type="checkbox"/>
Unique	<input type="checkbox"/>
External ID	<input type="checkbox"/>
AI Prediction	<input type="checkbox"/>
Partial Update	<input type="checkbox"/>

**Field Information**

Field Label	Product Description	Object Name	Product
Field Name	Product_Description	Data Type	Text Area
API Name	Product_Description_c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Narmatha_S, 9/3/2025, 1:05 AM	Modified By	Narmatha_S, 9/3/2025, 1:05 AM

**General Options**

Required	<input type="checkbox"/>
Default Value	

**Validation Rules**

New	Validation Rules Help ?
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Setup > OBJECT MANAGER Purchase Order

**Custom Field Definition Detail**

**Field Information**

Field Label	Supplier ID	Object Name	Purchase_Order
Field Name	Supplier_ID	Data Type	Lookup
API Name	Supplier_ID__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Narmatha_S, 9/3/2025, 1:20 AM	Modified By	Narmatha_S, 9/3/2025, 1:20 AM

**Lookup Options**

Related To	Supplier	Child Relationship Name	Purchase_Orders
Related List Label	Purchase Orders		
Required	✓		

What to do if the lookup record is deleted: Don't allow deletion of the lookup record that's part of a lookup relationship.

Setup > OBJECT MANAGER Purchase Order

**Purchase Order Custom Field Order Count**

**Custom Field Definition Detail**

**Field Information**

Field Label	Order Count	Object Name	Purchase_Order
Field Name	Order_Count	Data Type	Number
API Name	Order_Count__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Narmatha_S, 9/5/2025, 10:10 PM	Modified By	Narmatha_S, 9/5/2025, 10:10 PM

Setup > OBJECT MANAGER Purchase Order

**Purchase Order Custom Field Order Date**

**Custom Field Definition Detail**

**Field Information**

Field Label	Order Date	Object Name	Purchase_Order
Field Name	Order_Date	Data Type	Date
API Name	Order_Date__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Narmatha_S, 9/3/2025, 2:28 AM	Modified By	Narmatha_S, 9/3/2025, 2:28 AM

Setup Home Object Manager

SETUP > OBJECT MANAGER  
**Order Item**

Unit Price

Custom Field Definition Detail

Field Label	Unit Price	Object Name	Order Item
Field Name	Unit_Price	Data Type	Picklist
API Name	Unit_Price__c	Description	
Description		Help Text	
Help Text		Data Owner	
Data Owner		Field Usage	
Field Usage		Data Sensitivity Level	
Data Sensitivity Level		Compliance Categorization	
Compliance Categorization		Created By	Narmatha S, 9/12/2025, 5:52 PM
Created By		Modified By	Narmatha S, 9/12/2025, 5:52 PM

Help for this Page

Fields & Relationships

- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters

Back to Order Item

Setup Home Object Manager

SETUP > OBJECT MANAGER  
**Inventory Transaction**

Transaction Type

Custom Field Definition Detail

Field Label	Transaction Type	Object Name	Inventory Transaction
Field Name	Transaction_Type	Data Type	Picklist
API Name	Transaction_Type__c	Description	
Description		Help Text	
Help Text		Data Owner	
Data Owner		Field Usage	
Field Usage		Data Sensitivity Level	
Data Sensitivity Level		Compliance Categorization	
Compliance Categorization		Created By	Narmatha S, 9/3/2025, 3:36 AM
Created By		Modified By	Narmatha S, 9/3/2025, 3:36 AM

Validation Rules [0]

Help for this Page

Fields & Relationships

- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters

Back to Inventory Transaction

Setup Home Object Manager

SETUP > OBJECT MANAGER  
**Order Item**

Amount

Custom Field Definition Detail

Field Label	Amount	Object Name	Order Item
Field Name	Amount	Data Type	Text
API Name	Amount__c	Description	
Description		Help Text	
Help Text		Data Owner	
Data Owner		Field Usage	
Field Usage		Data Sensitivity Level	
Data Sensitivity Level		Compliance Categorization	
Compliance Categorization		Created By	Narmatha S, 9/3/2025, 9:54 AM
Created By		Modified By	Narmatha S, 9/5/2025, 11:19 PM

Help for this Page

Fields & Relationships

- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters

Back to Order Item

orgfarm-a1f0895c61-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01gK000001zw89/FieldsAndRelationships/00NgK00001bP1EP/...

The screenshot shows the Salesforce Setup interface for the 'Supplier' object. The left sidebar lists various configuration options like Details, Fields & Relationships, Page Layouts, etc. The main content area displays the 'Email' custom field definition. The 'Field Information' section includes details such as Field Label (Email), Field Name (Email), API Name (Email\_c), Data Type (Email), and Object Name (Supplier). The 'Custom Field Definition Detail' section has buttons for Edit, Set Field-Level Security, View Field Accessibility, and Where is this used?

SETUP > OBJECT MANAGER  
Supplier

Supplier Custom Field  
Email

Back to Supplier

Validation Rules [0]

Custom Field Definition Detail

Help for this Page ?

Field Information

Field Label	Email	Object Name	Supplier
Field Name	Email	Data Type	Email
API Name	Email_c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Narmatha S, 9/3/2025, 3:41 AM	Modified By	Narmatha S, 9/3/2025, 3:41 AM

orgfarm-a1f0895c61-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01gK000001zw89/FieldsAndRelationships/00NgK00001bKZf0/...

The screenshot shows the Salesforce Setup interface for the 'Supplier' object. The left sidebar lists various configuration options like Details, Fields & Relationships, Page Layouts, etc. The main content area displays the 'Phone Number' custom field definition. The 'Field Information' section includes details such as Field Label (Phone Number), Field Name (Phone\_Number), API Name (Phone\_Number\_c), Data Type (Phone), and Object Name (Supplier). The 'Custom Field Definition Detail' section has buttons for Edit, Set Field-Level Security, View Field Accessibility, and Where is this used?

SETUP > OBJECT MANAGER  
Supplier

Supplier Custom Field  
Phone Number

Back to Supplier

Validation Rules [0]

Custom Field Definition Detail

Help for this Page ?

Field Information

Field Label	Phone Number	Object Name	Supplier
Field Name	Phone_Number	Data Type	Phone
API Name	Phone_Number_c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Narmatha S, 9/3/2025, 3:40 AM	Modified By	Narmatha S, 9/3/2025, 3:40 AM

## Updating of Page Layouts

- Customized page layouts to display relevant fields and sections.

The screenshot shows the Salesforce Setup interface for the Product object. The left sidebar has a 'Page Layouts' section selected. The main area displays the 'Layout Properties' tab for the 'Product' page layout. The 'Fields' section lists various fields like 'Section', 'Blank Space', 'Last Modified By', 'Product ID', etc. Below the fields, there are two sections: 'Information' and 'System Information', each containing sample data rows.

Section	Field Name	Value
Information	Product ID	Sample Text
Information	Product Name	Sample Text
Information	Product Description	Sample Text
System Information	Unit Price	\$123.45
System Information	Current Stock Level	97,649
System Information	Minimum Stock Level	15,735
System Information	Owner	Sample_Text

The screenshot shows the Salesforce Setup interface for the Purchase Order object. The left sidebar has a 'Page Layouts' section selected. The main area displays the 'Layout Properties' tab for the 'Purchase Order' page layout. The 'Fields' section lists fields like 'Section', 'Blank Space', 'Expected Delivery...', 'Owner', etc. Below the fields, there are two sections: 'Information' and 'System Information', each containing sample data rows.

Section	Field Name	Value
Information	Purchase Order ID	Sample Text
Information	Supplier ID	Sample Text
Information	Order Date	9/13/2025
Information	Expected Delivery Date	9/13/2025
Information	Order Count	75,997
System Information	Actual Delivery Date	9/13/2025
System Information	Total Order Cost	\$123.45
System Information	Owner	Sample_Text

<http://orgfarm-a1f0895c61-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgK000001ztbi/PageLayouts/00hgK000006o7sUQAQ/view>

**Order Item**

**Page Layouts**

Field	Type	Description
Order Item ID	Text	Sample Text
Amount	Text	\$123.45
Product ID	Text	Sample Text
Unit Price	Text	\$123.45
Last Modified By	Text	Sample Text
Purchase Order	Text	Sample Text
Product	Text	Sample Text
Quantity Received	Text	Sample Text
Quantity Ordered	Text	12,687

**Product details**

Field	Type	Description
Product	Text	Sample Text
Unit Price ID	Text	\$123.45

**System Information**

Field	Type	Description
Quantity Ordered	Text	12,687
Quantity Received	Text	27,977

<http://orgfarm-a1f0895c61-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgK000001zvtd/PageLayouts/00hgK000006oBG9QAM/view>

**Inventory Transaction**

**Page Layouts**

Field	Type	Description
Transaction ID	Text	Sample Text
Purchase Order ID	Text	Sample Text
Transaction Type	Text	Sample Text
Transaction Date	Text	9/13/2025
Total Order Cost ID	Text	\$123.45
Owner	Text	Sample Text
Last Modified By	Text	Sample Text

**System Information**

Field	Type	Description
Created By	Text	Sample Text
Last Modified By	Text	Sample Text

<http://orgfarm-a1f0895c61-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgK000001zw89/PageLayouts/00hgK000006oBZVQA2/view>

**Supplier**

**Page Layouts**

Field	Type	Description
Supplier ID	Text	Sample Text
Supplier Name	Text	Sample Text
Contact Person	Text	Sample Text
Created By	Text	Sample Text
Email	Text	sarah.sample@company.com
Last Modified By	Text	Sample Text
Phone Number	Text	1-415-555-1212
Supplier ID	Text	Sample Text

**System Information**

Field	Type	Description
Created By	Text	Sample Text
Last Modified By	Text	Sample Text

**Custom Links**

Link	Description
Sample Text	Sample Text

- Configured compact layouts for quick record preview.

The screenshot shows the Salesforce Object Manager interface for the Product object. The left sidebar has 'Compact Layouts' selected under the 'Product' section. The main area displays the 'Product Compact Layout' configuration. It includes fields for Label (Product Compact Layout), API Name (Product\_Compact\_Layout), and Included Fields (Product Name, Unit Price, Current Stock Level). The 'Compact Layout Detail' section shows it was created by Narmatha S. on 9/3/2025 at 7:24 PM and modified by Narmatha S. on 9/3/2025 at 7:24 PM. Buttons for Edit, Clone, Delete, and Compact Layout Assignment are available.

The screenshot shows the Salesforce Object Manager interface for the Purchase Order object. The left sidebar has 'Compact Layouts' selected under the 'Purchase Order' section. The main area displays the 'Purchase Order Compact Layout' configuration. It includes fields for Label (Purchase Order Compact Layout), API Name (Purchase\_Order\_Compact\_Layout), and Included Fields (Purchase Order ID, Order Date, Total Order Cost, Supplier ID). The 'Compact Layout Detail' section shows it was created by Narmatha S. on 9/3/2025 at 7:30 PM and modified by Narmatha S. on 9/3/2025 at 7:30 PM. Buttons for Edit, Clone, Delete, and Compact Layout Assignment are available.

## Validation Rules

- Prevented expired products from being added.
- Mandatory supplier details before creating purchase orders.

The screenshot shows the Salesforce Setup interface under the Object Manager section for Purchase Order. On the left, a sidebar lists various configuration options like Details, Fields & Relationships, Page Layouts, and Lightning Record Pages. The main content area displays a validation rule named "Expected\_Delivery\_Date\_Validation". The rule's details are as follows:

Rule Name	Expected_Delivery_Date_Validation	Active
Error Condition Formula	(Expected_Delivery_Date__c - Order_Date__c) > 7	<input checked="" type="checkbox"/>
Error Message	The Expected Delivery Date should not exceed 7 days.	Error Location Top of Page
Description		
Created By	Narmatha S. 9/3/2025, 7:35 PM	Modified By Narmatha S. 9/3/2025, 7:35 PM

## Profiles

- Configured profiles for user access and permissions.

The screenshot shows the Salesforce Setup interface under the Profiles section. The left sidebar shows categories like Hyperforce Assistant, Users (with Profiles selected), Data, Feature Settings, Functions, and Marketing. The main content area shows the "Inventory Manager" profile. The profile's details are as follows:

Name	Inventory Manager	Custom Profile
User License	Salesforce	<input checked="" type="checkbox"/>
Description		
Created By	Narmatha S. 9/3/2025, 7:38 PM	Modified By Narmatha S. 9/12/2025, 6:03 PM

Below the profile detail, there are sections for Page Layouts and Standard Object Layouts.

**Profile**  
**Purchase Manager**

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

Login IP Ranges [0]	Enabled Apex Class Access [0]	Enabled Visualforce Page Access [0]	Enabled External Data Source Access [0]	Enabled Named Credential Access [0]
Enabled External Credential Principal Access [0]	Enabled Custom Metadata Type Access [0]	Enabled Custom Setting Definitions Access [0]	Enabled Flow Access [0]	Enabled Service Presence Status Access [0]
Enabled Custom Permissions [0]				

**Profile Detail**

Name	Purchase Manager	<a href="#">Edit</a>	<a href="#">Clone</a>	<a href="#">Delete</a>	<a href="#">View Users</a>
User License	Salesforce	Custom Profile <input checked="" type="checkbox"/>			
Description					
Created By	Narmatha S, 9/3/2025, 8:13 PM				
Modified By	Narmatha S, 9/12/2025, 6:03 PM				

**Page Layouts**

Standard Object Layouts

## Roles

- Created roles to define data visibility across users.

**Role**  
**SVP, Sales & Marketing**

Below is the list of users assigned to this role. Click Edit to modify the role name. Click Assign Users to Role to assign existing users to this role. Click New User to create a user for this role.

Hierarchy: Michael job college of arts and science for women » CEO » SVP, Sales & Marketing  
Siblings: SVP\_Customer Service & Support, CFO, SVP\_Human Resources, COO

[Users in SVP, Sales & Marketing Role \[0\]](#)

**Role Detail**

Label	SVP, Sales & Marketing	Role Name	SVPsalesMarketing
This role reports to	CEO	Role Name as displayed on reports	SVP, Sales & Marketing
Modified By	OrgFarm EPIC, 8/28/2025, 8:46 PM	Sharing Groups	Role, Role and Internal Subordinates
Opportunity Access	Users in this role can edit all opportunities associated with accounts that they own, regardless of who owns the opportunities		
Case Access	Users in this role can edit all cases associated with accounts that they own, regardless of who owns the cases		

## Permission Sets

- Created permission sets to grant additional access.

Setup

Permission Sets

**Purchase Manager Create Access**

Description: Purchase Manager Create Access

API Name: Purchase\_Manager\_Create\_Access

Namespace Prefix: Purchase

Created By: Narmatha S, 9/3/2025, 8:40 PM

Last Modified By: Narmatha S, 9/3/2025, 8:45 PM

Assigned Apps: Settings that specify which apps are visible in the app menu

Assigned Connected Apps: Settings that specify connected apps are visible in the app menu

## Flows

- Stock Reorder Flow → Alerts when stock is low.
- Expiry Alert Flow → Notifies when products near expiry.

Flow Builder

Actual Delivery Date Updating - V2

Select Object

\*Object: Purchase Order

Configure Trigger

Trigger the Flow When:

- A record is created
- A record is updated
- A record is created or updated
- A record is deleted

Get Purchase Record

Flow Builder

Actual Delivery Date Updating - V2

Edit Get Records

Find Salesforce records and store their field values in flow variables.

\*Label: Get Purchase Record

\*API Name: Get\_Purchase\_Record

Description:

Get Records of This Object

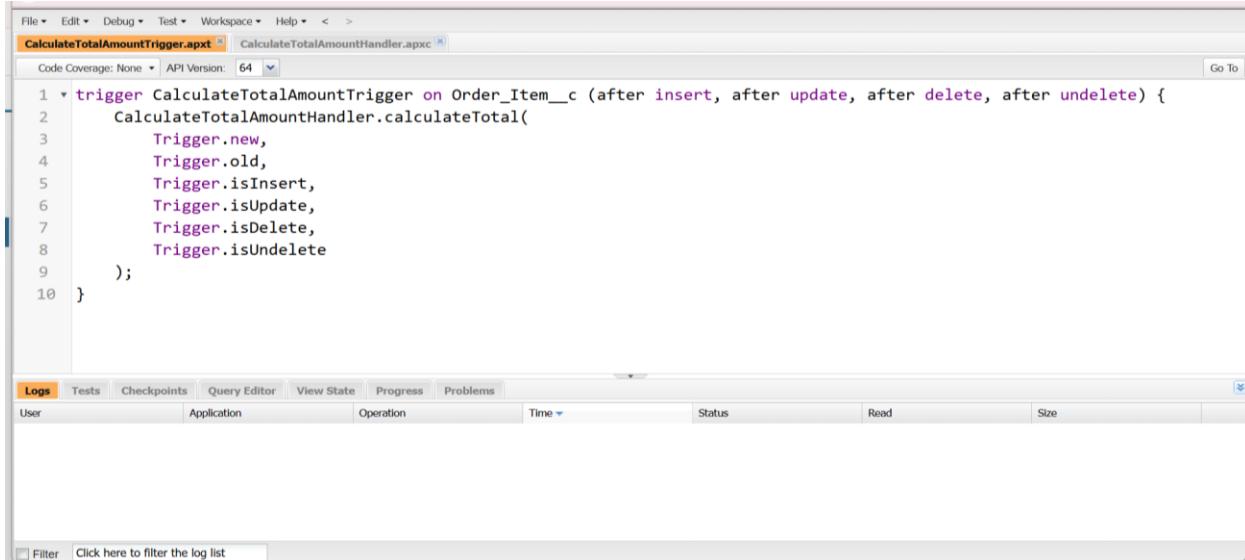
\*Object: Purchase Order

Filter Purchase Order Records

Get Purchase Record

## Triggers

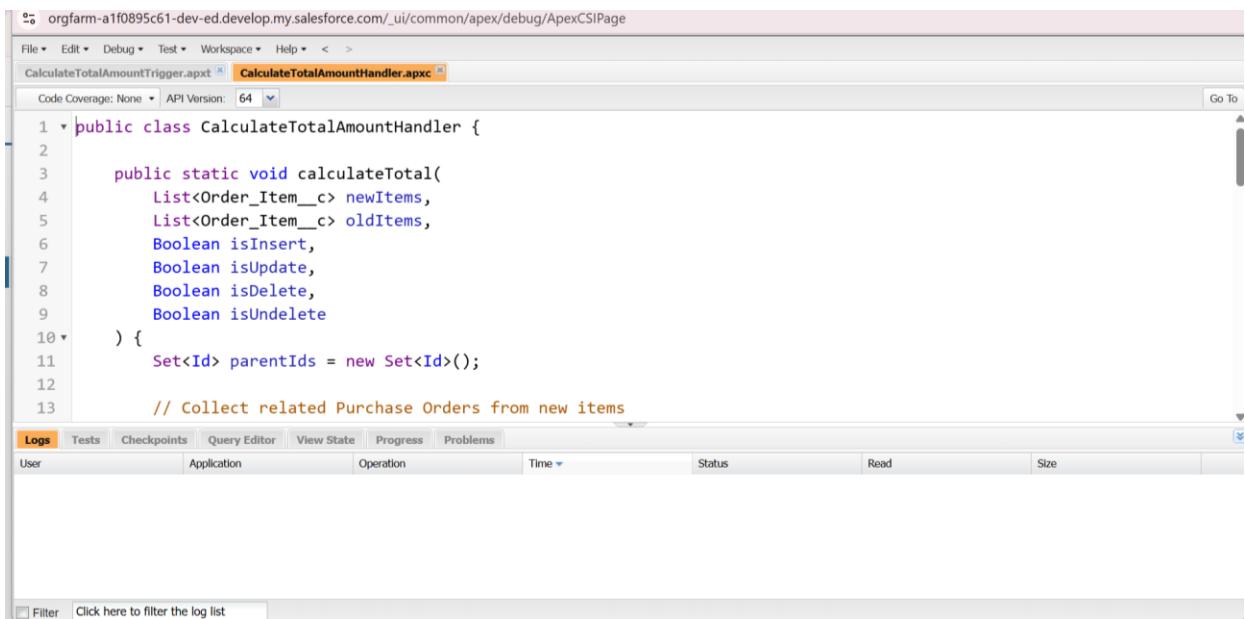
- Trigger to prevent duplicate products.
- Trigger to auto-update stock after Purchase order approval.



The screenshot shows the Salesforce IDE interface with the code editor open. The file being edited is `CalculateTotalAmountTrigger.apxt`. The code defines a trigger on the `Order_Item__c` object with the following logic:

```
trigger CalculateTotalAmountTrigger on Order_Item__c (after insert, after update, after delete, after undelete) {
    CalculateTotalAmountHandler.calculateTotal(
        Trigger.new,
        Trigger.old,
        Trigger.isInsert,
        Trigger.isUpdate,
        Trigger.isDelete,
        Trigger.isUndelete
    );
}
```

Below the code editor is a log viewer window titled "Logs". The log table has columns for User, Application, Operation, Time, Status, Read, and Size. There are no entries in the log at this point.



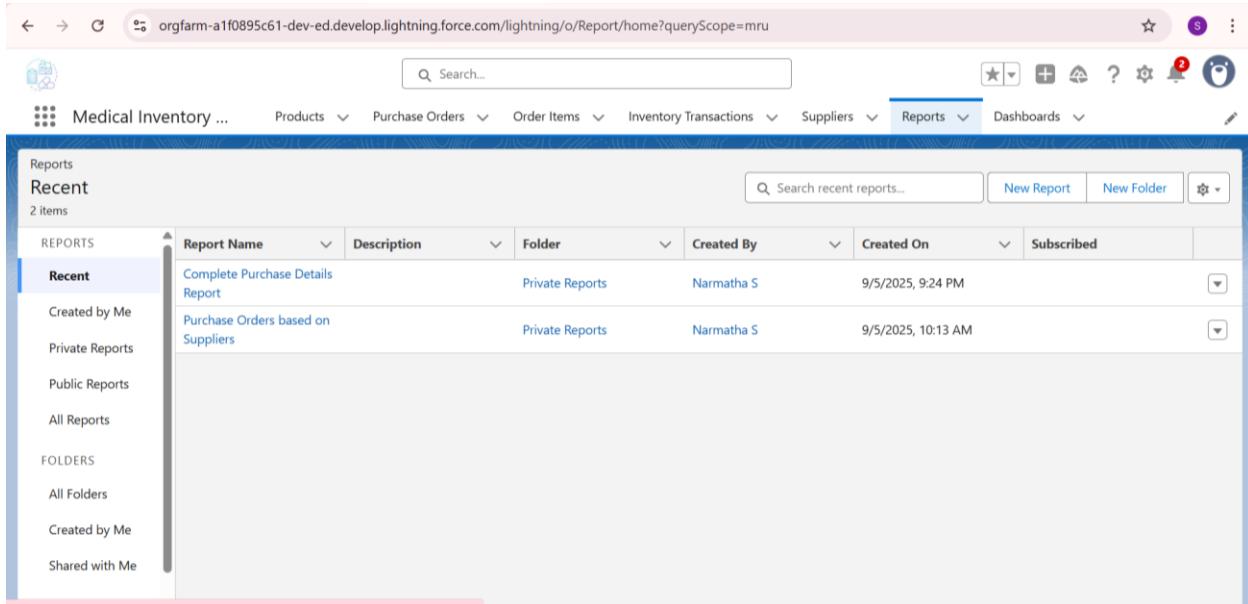
The screenshot shows the Salesforce IDE interface with the code editor open. The file being edited is `CalculateTotalAmountHandler.apxc`. The code defines a class `CalculateTotalAmountHandler` with the following implementation:

```
public class CalculateTotalAmountHandler {
    public static void calculateTotal(
        List<Order_Item__c> newItems,
        List<Order_Item__c> oldItems,
        Boolean isInsert,
        Boolean isUpdate,
        Boolean isDelete,
        Boolean isUndelete
    ) {
        Set<Id> parentIds = new Set<Id>();
        // Collect related Purchase Orders from new items
    }
}
```

Below the code editor is a log viewer window titled "Logs". The log table has columns for User, Application, Operation, Time, Status, Read, and Size. There are no entries in the log at this point.

## Reports

- Generated reports for supplier performance, stock status, and purchase orders.

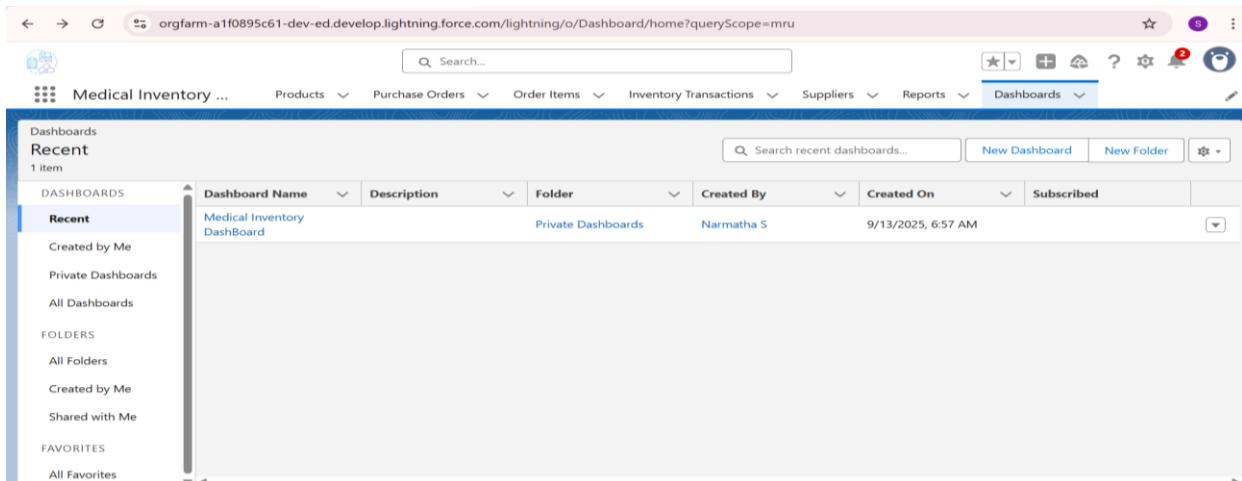


The screenshot shows the Salesforce Reports page. The URL is <https://orgfarm-a1f0895c61-dev-ed.lightning.force.com/lightning/o/Report/home?queryScope=mru>. The top navigation bar includes links for Products, Purchase Orders, Order Items, Inventory Transactions, Suppliers, Reports (which is selected), and Dashboards. A search bar at the top right says "Search...". Below the navigation is a sidebar with sections for Reports (Recent, Created by Me, Private Reports, Public Reports, All Reports) and Folders (All Folders, Created by Me, Shared with Me). The main content area displays a table of recent reports:

Report Name	Description	Folder	Created By	Created On	Subscribed
Complete Purchase Details Report	Private Reports	Narmatha S	9/5/2025, 9:24 PM		
Purchase Orders based on Suppliers	Private Reports	Narmatha S	9/5/2025, 10:13 AM		

## Dashboards

- Created dashboards to visualize stock levels, supplier performance, and transactions.



The screenshot shows the Salesforce Dashboards page. The URL is <https://orgfarm-a1f0895c61-dev-ed.lightning.force.com/lightning/o/Dashboard/home?queryScope=mru>. The top navigation bar includes links for Products, Purchase Orders, Order Items, Inventory Transactions, Suppliers, Reports, and Dashboards (which is selected). A search bar at the top right says "Search...". Below the navigation is a sidebar with sections for Dashboards (Recent, Created by Me, Private Dashboards, All Dashboards) and Folders (All Folders, Created by Me, Shared with Me). The main content area displays a table of recent dashboards:

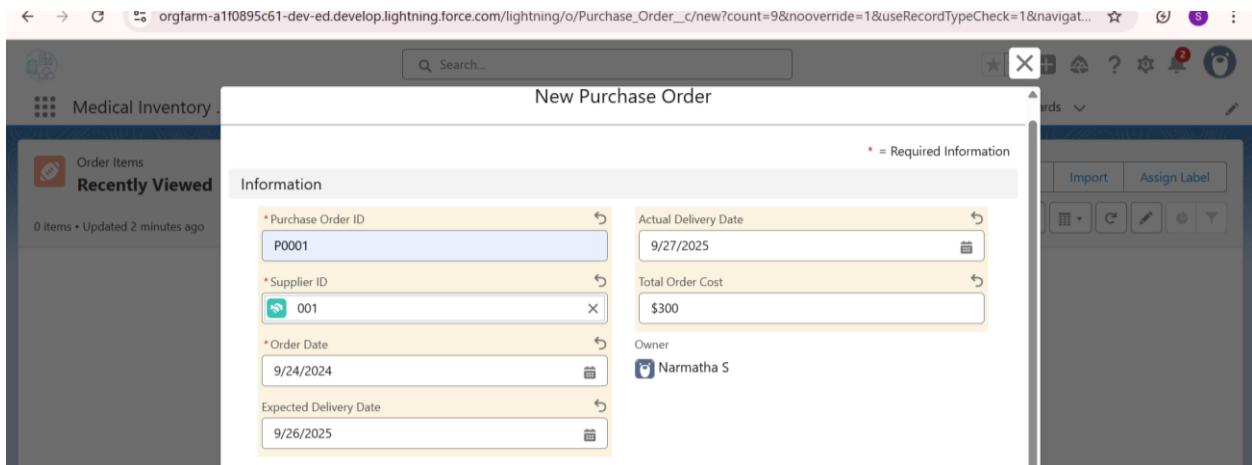
Dashboard Name	Description	Folder	Created By	Created On	Subscribed
Medical Inventory DashBoard	Private Dashboards	Narmatha S	9/13/2025, 6:57 AM		

## FUNCTIONAL AND PERFORMANCE TESTING

- Tested validation rules by attempting invalid inputs.
- Verified trigger functionality with duplicate product entries.
- Confirmed flows run automatically on stock and expiry events.
- Validated approval processes with email notifications.

## RESULTS

- Tabs displayed for Supplier, Product, Purchase Order, Transaction.
- Email alerts for approvals, rejections, and expiry reminders.
- Trigger error messages shown on duplicate entries.
- Flow executions successfully performed.



## ADVANTAGES & DISADVANTAGES

## **Advantages:**

- Streamlines medical inventory processes.
- Reduces manual errors.
- Provides real-time alerts and reports.
- Improves decision-making.

## **Disadvantages:**

- Requires Salesforce expertise for setup.
- Internet dependency.
- Licensing cost for enterprise-level usage.

## **CONCLUSION**

The **Medical Inventory Management System** built on Salesforce effectively automates medical inventory operations. By integrating supplier management, product tracking, purchase order workflows, and automated alerts, the system improves accuracy, reduces manual effort, and supports better organizational efficiency.

## **APPENDIX**

### **Trigger (Prevent Duplicate Products)**

```
trigger PreventDuplicateProducts on Product__c (before insert) {  
  
    Set<String> existingProducts = new Set<String>();  
  
    for (Product__c prod : [SELECT Name FROM Product__c]) {  
  
        existingProducts.add(prod.Name);  
    }  
  
    for (Product__c newProd : Trigger.new) {
```

```

        if (existingProducts.contains(newProd.Name)) {
            newProd.addError('This product already exists in inventory.');
        }
    }
}

```

## Scheduler (Monthly Inventory Report)

```

global class MonthlyInventoryReport implements Schedulable {
    global void execute(SchedulableContext sc) {
        sendInventoryReport();
    }
    public static void sendInventoryReport() {
        List<Product__c> products = [SELECT Name, Quantity__c, Expiry_Date__c FROM Product__c];
        String report = 'Monthly Inventory Report:\n\n';
        for (Product__c p : products) {
            report += 'Product: ' + p.Name + ', Quantity: ' + p.Quantity__c + ', Expiry: ' + p.Expiry_Date__c +
            '\n';
        }
        Messaging.SingleEmailMessage email = new Messaging.SingleEmailMessage();
        email.setToAddresses(new String[]{'admin@hospital.com'});
        email.setSubject('Monthly Inventory Report');
        email.setPlainTextBody(report);
        Messaging.sendEmail(new Messaging.SingleEmailMessage[]{email});
    }
}

```

