

# Project Planning

## Project Milestones & Tasks

Date	1 November 2025
Team ID	NM2025TMID04221
Project Name	Medical Inventory Management
Maximum Marks	1 Mark

### Milestone 1-Salesforce Account

#### Activity 1: Creating Developer Account

Creating a developer org in salesforce.

1. Go to <https://developer.salesforce.com/signup>
2. On the sign up form, enter the following details :

The image is a composite of two screenshots. The left side shows a dark blue background with a white computer monitor displaying a Salesforce developer interface. Overlaid text reads: "Build enterprise-quality apps fast to bring your ideas to life" and a bulleted list: "• Build apps fast with drag and drop tools • Customize your data model with clicks • Go further with Apex code • Integrate with anything using powerful APIs • Stay protected with enterprise-grade security • Customize UI with clicks or any leading-edge web framework". The right side shows the "Sign up for your Salesforce Developer Edition" page from the developer website. It features the Salesforce logo, a brief description ("A full-featured copy of the Platform, for free"), and a call-to-action button ("Complete the form to start your free trial. Our team will be in touch to help you make the most of your trial."). Below this are input fields for First Name, Last Name, Email, Role, and Company, each with a required asterisk.

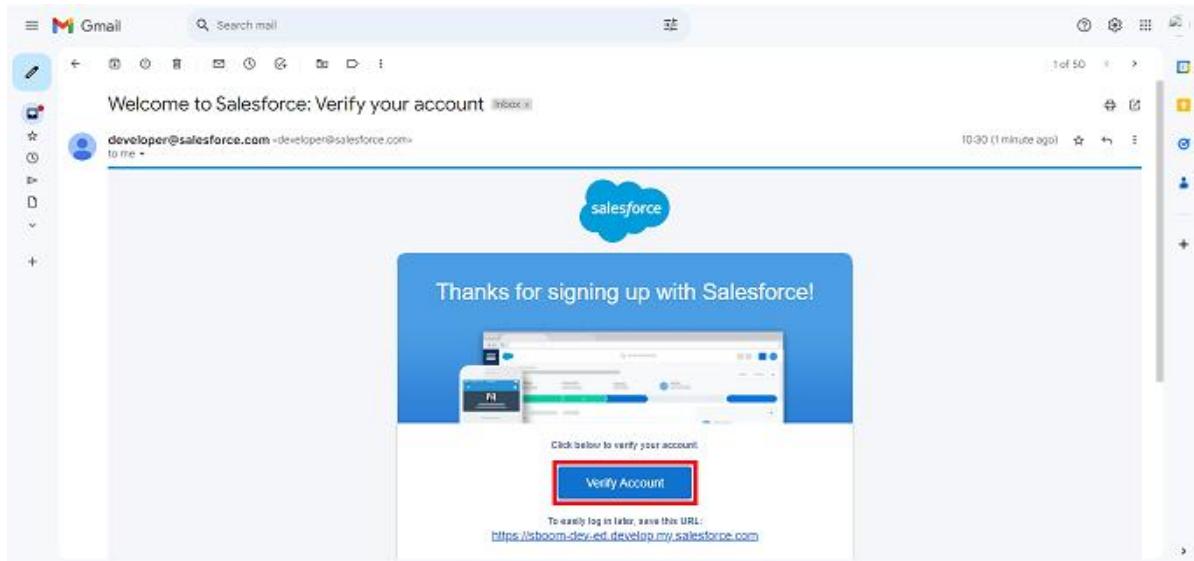
1. First name & Last name
2. Email
3. Role : Developer
4. Company : College Name
5. County : India
6. Postal Code : pin code
7. Username : should be a combination of your name and company

This need not be an actual email id, you can give anything in the format : `username@organization.com`

Click on sign me up after filling these.

## Activity 2: Account Activation

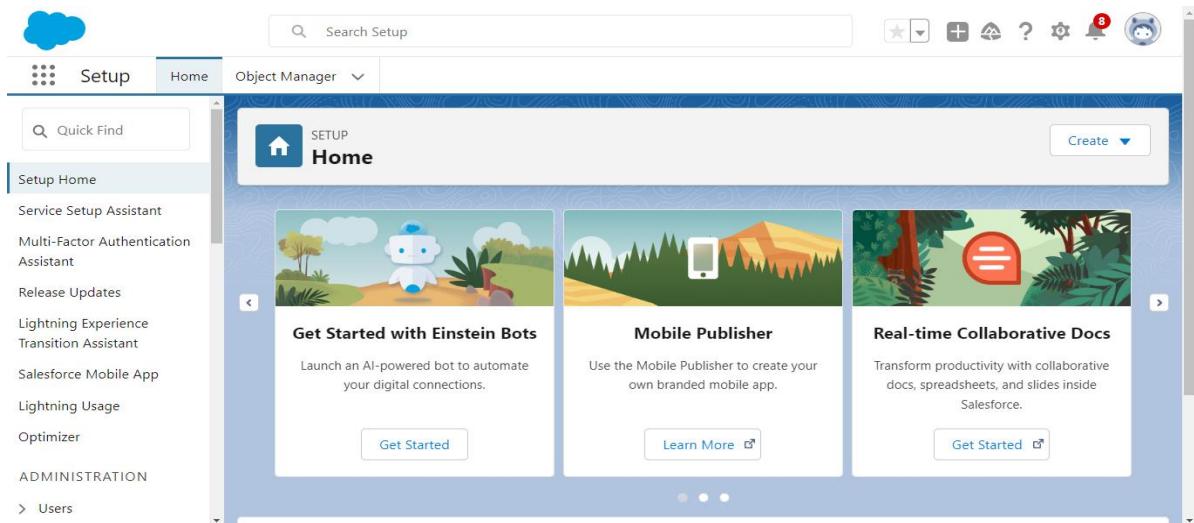
1. Go to the inbox of the email that you used while signing up. Click on the verify account to activate your account. The email may take 5-10mins.



2. Click on Verify Account
3. Give a password and answer a security question and click on change password.

A screenshot of a "Change Your Password" page. The title is "Change Your Password". It says "Enter a new password for lead@sb.oom. Make sure to include at least:" followed by three requirements: "8 characters", "1 letter", and "1 number". There are two input fields: "New Password" and "Confirm New Password", both containing dots. Below them is a "Security Question" dropdown set to "In what city were you born?". An "Answer" input field contains "asdfghjkl". A large red box highlights the "Change Password" button at the bottom.

4. Then you will redirect to your salesforce setup page.

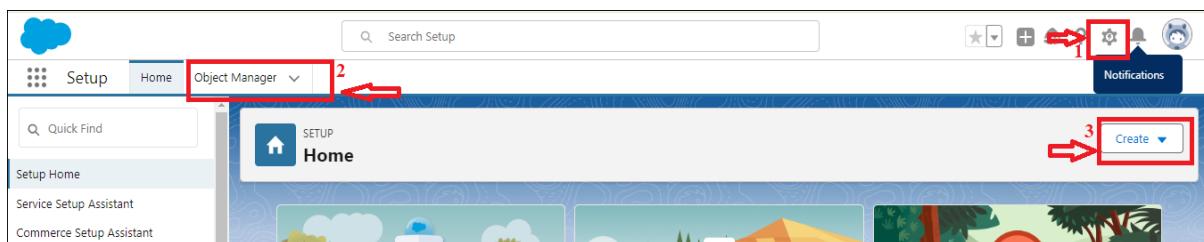


## Milestone 2-Objects

### Activity 1: Creating a Product Object

To create an object:

1. From the setup page
2. Click on Object Manager
3. Click on Create >> Click on Custom Object.
4. Enter the label name as Product
5. Enter Plural label name as Products
6. Enter Record Name as Product ID
7. Select Data Type as Text.
8. Select Allow reports.
9. Select Allow search.
10. Click on Save and New



**Custom Object Definition Edit**

**Custom Object Information**

The singular and plural labels are used in tabs, page layouts, and reports.

4. Label: Product Example: Account  
5. Plural Label: Products Example: Accounts  
Starts with vowel sound

The Object Name is used when referencing the object via the API.

Object Name: Product Example: Account

Description:

Context-Sensitive Help Setting: Open the standard Salesforce.com Help & Training window | Open a window using a Visualforce page

**Enter Record Name Label and Format**

The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.

6. Record Name: Product ID Example: Account Name  
7. Data Type: Text Warning: If you plan to insert a high volume of records in this object, via the API for example, use the Text data type.

**Optional Features**

8. Allow Reports   
 Allow Activities  
 Track Field History  
 Allow in Chatter Groups  
 Enable Licensing [i](#)

**Deployment Status**

9. In Development   
**Deployed**

**Search Status**

When this setting is enabled, your users can find records of this object type when they search. [Learn more.](#)

9. Allow Search

**Object Creation Options (Available only when custom object is first created)**

10. Add Notes and Attachments related list to default page layout  
 Launch New Custom Tab Wizard after saving this custom object

Save **Save & New** Cancel

Activate Windows  
Go to Settings to activate Windows.

In the same way Create Purchase Order, Order Item, Inventory Transaction and Supplier objects.

## Milestone 3-Tabs

### Activity 1: Creating a tab for Product Object

1. Go to the setup page >> type Tabs in Quick Find bar
2. Click on tabs
3. Click on New (under custom object tab).
4. Select Object(Product) >> Select the tab style
5. Click on Next >> (Add to profiles page) keep it as default >> Click on Next (Add to Custom App) uncheck the include tab .
6. Make sure that the Append tab to user's existing personal customizations is checked.
7. Click save

The first screenshot shows the 'Tabs' page in the Setup menu. A red box labeled '1' highlights the search bar at the top. A red box labeled '2' highlights the 'Tabs' link in the sidebar. A red box labeled '3' highlights the 'New' button under 'Custom Object Tabs'. The second screenshot shows the 'Step 1. Enter the Details' page for creating a new custom tab. A red box labeled '4' highlights the 'Object' dropdown set to 'Product' and the 'Tab Style' section showing 'Stethoscope'. A red box labeled '5' highlights the 'Next' button at the bottom right.

## Milestone 4-The Lightning App

### Activity 1: Create a Lightning App for Medical Inventory Management

1. From Setup, enter App Manager in the Quick Find and select App Manager.
2. Click New Lightning App.
3. Enter Medical Inventory Management as the App Name >> Click on upload image and add an image related to Medical Inventory then click next
4. Under App Options, leave the default selections and click next.
5. Under Utility Items, leave as is and click Next.
6. From Available Items, select Products, Purchase Orders, Order Items, Inventory Transactions, Suppliers, Reports, and Dashboards and move them to Selected Item and Click Next.
7. From Available Profiles, select System Administrator and move it to Selected Profiles.
8. Click Save & Finish.

**Lightning Experience App Manager**

28 items • Sorted by App Name • Filtered by All appmenuitems - TabSet Type

App Name	Developer Name	Description	Last Modified ...	App Type	Vi...
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### New Lightning App

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**App Details**

\*App Name  3

\*Developer Name

Description

**App Branding**

Image 3

Primary Color Hex Value

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

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Next 4

#### 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**

C Create ▾

Dashboards

**Selected Items**

	Products
	Purchase Orders
	Order Items
	Inventory Transactions
	Suppliers
	Reports

5

### New Lightning App

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7
8

**User Profiles**

Choose the user profiles that can access this app.

**Available Profiles**

C

System Administrator

**Selected Profiles**

Back Save & Finish

## Milestone 5 -Fields

### Activity 1: Creating a TextArea Field in Product Object

To create fields in an object:

1. Click the gear icon and select Setup. This launches Setup in a new tab.
2. Click the Object Manager tab next to Home.
3. Select Product custom object.
4. Select Fields & Relationships from the left navigation
5. Click on New
6. Select TextArea field, click Next
7. Enter Field Label as “Product Description” .
8. Click Next, Next, then Save & New.

This screenshot shows the 'Select Field Type' step in the Salesforce setup wizard. A list of field types is displayed on the left, each with a brief description on the right. The 'Text Area' option is selected and highlighted with a red box, labeled with the number 6. Other options include Geolocation, Number, Percent, Phone, Picklist, Picklist (Multi-Select), Text, Text Area (Long), Text Area (Rich), Text (Encrypted), Time, and URL. At the bottom right, there are 'Next' and 'Cancel' buttons, with 'Next' also highlighted with a red box, labeled with the number 6.

This screenshot shows the 'Enter the details' step in the Salesforce setup wizard. The 'Field Label' is set to 'Product Description' (highlighted with a red box, labeled with the number 7). The 'Field Name' is set to 'Product\_Description'. The 'Description' and 'Help Text' fields are empty. Under 'Required', there is a checkbox 'Always require a value in this field in order to save a record' (unchecked). Under 'Auto add to custom report type', there is a checked checkbox 'Add this field to existing custom report types that contain this entity'. The 'Default Value' section contains a formula editor with the placeholder text: '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.FieldName\_\_c}'. At the top right, it says 'Step 2 of 4' and there are 'Previous', 'Next' (highlighted with a red box, labeled with the number 8), and 'Cancel' buttons.

### Activity 2: Creating a Number Field in Product object

To create fields in an object:

1. Go to setup >> click on Object Manager >> type object name(Product) in quick find box >> click on the Product custom object.
2. Now click on “Fields & Relationships”
3. Click on New.
4. Select Data type as “Number” and click Next.
5. Enter Field Label as “ Current Stock Level”.
6. Length - 18, Decimal Places - 0.
7. Click on Next, Next and Save.

Step 2, Enter the details Step 2 of 4

**Field Label:** Current Stock Level 5

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".

**Length:** 18 **Decimal Places:** 0

**Field Name:** Current\_Stock\_Level 6 **Description:** Number of digits to the left of the decimal point

**Help Text:** Number of digits to the right of the decimal point

**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

7 Next Cancel

## Milestone 6-Editing Of Page Layout

### Activity 1: To edit a Page Layout in Product Object

1. Go to setup >> click on Object Manager >> type object name(Product) in quick find box >> click on the Product object >> Page Layouts .
2. Click on the Product Layout.
3. Drag and Arrange the field as shown below.

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	Last Modified By	Product ID
Blank Space	Minimum Stock Level	Product Name
Created By	Owner	Unit Price
Current Stock Level	Product Description	

**Information (Header visible on edit only)**

Product ID	Sample Text	Unit Price	₹123.45
Product Name	Sample Text	Current Stock Level	12,420
Product Description	Sample Text	Minimum Stock Level	21,114
		Owner	Sample Text

**System Information (Header visible on edit only)**

Created By	Sample Text	Last Modified By	Sample Text
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## Milestone 7-Compact Layouts

### Activity 1: To create a Compact Layout to a Product Object

1. Go to setup >> click on Object Manager >> type object name(Product) in quick find box >> click on the Product object
2. Click on Compact Layouts in the sidebar .
3. Click on New.
4. Enter the Label as “Product Compact Layout”.
5. Select the Compact Layout Fields : Select Product name, Unit Price, Current Stock Level.
6. Click Save.
7. Click Compact Layout Assignment.
8. Click Edit Assignment.
9. Choose "Product Compact Layout" from the dropdown.
10. Click Save.

The screenshot shows the Salesforce Object Manager for the Product object. The left sidebar lists various options like Details, Fields & Relationships, Page Layouts, etc., with 'Compact Layouts' selected. The main area displays a table titled 'Compact Layouts' with one item, 'System Default'. A red box labeled '2' highlights the 'New' button in the top right of the table header. Below the table, a section titled 'Enter Compact Layout Information' contains fields for 'Label' (set to 'Product Compact Layout') and 'Name' (set to 'Product\_Compact\_Layout'). A red box labeled '4' surrounds these input fields. The next section, 'Select Compact Layout Fields', shows a list of 'Available Fields' on the left and 'Selected Fields' on the right. Fields listed include Created By, Last Modified By, Minimum Stock Level, Owner, and Product ID. Three fields are selected: Product Name, Unit Price, and Current Stock Level. A red box labeled '5' surrounds the selected fields. At the bottom, there are 'Save' and 'Cancel' buttons, with 'Save' highlighted by a red box labeled '6'.

Product Compact Layouts  
Compact Layout Assignment

The screenshot shows a compact layout assignment interface. At the top, there are 'Save' and 'Cancel' buttons. Below them, a section titled 'Primary Compact Layout' asks to select a compact layout for list items in a mobile app. A dropdown menu labeled 'Primary Compact Layout: Product Compact Layout' is highlighted with a red box. To the right of the dropdown is a red number '9'. At the bottom of the screen, there is another 'Save' button highlighted with a red box, and a red number '10' is placed below it.

## Milestone 8-Validation Rules

### Activity 1: To create an Expected Delivery Date Validation rule to a Employee Object

1. Go to setup >> click on Object Manager >> type object name(Purchase Order) in quick find box>> click on the Purchase Order object
2. Click on the validation rule >> click on New.
3. Enter the Rule name as “Expected Delivery Date Validation”.
4. Select Active
5. Insert the Error Condition Formula as :  
 $(\text{Expected\_Delivery\_Date\_c} - \text{Order\_Date\_c}) > 7$

The screenshot shows the 'Validation Rule Edit' page for a Purchase Order. At the top, there are 'Save', 'Save & New', and 'Cancel' buttons. The 'Rule Name' field contains 'Expected\_Delivery\_Date\_Validation' and is highlighted with a red box. To its right is a red number '3'. Below this, the 'Active' checkbox is checked and highlighted with a red box. To its right is a red number '4'. The 'Description' field is empty. On the right side, there is a 'Quick Tips' box with a link to 'Operators & Functions'. In the bottom right corner, there is a note: 'R = Required Information'. The 'Error Condition Formula' section shows an example 'Discount\_Percent\_c > 30' and a formula input field containing '(Expected\_Delivery\_Date\_c - Order\_Date\_c) > 7'. This formula input field is highlighted with a red box and has a red number '5' to its right. To the right of the formula input field is a list of functions: ABS, ACOS, ADDMONTHS, AND, ASCII, ASIN, with 'All Function Categories' as the category.

6. Enter the Error Message as “The Expected Delivery Date should not exceed 7days.”.
7. Select the Error location as Top of Page
8. Click Save.

**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. 6

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 7

8 Save | Save & New | Cancel

## Milestone 9-Profiles

### Activity 1: To create an Inventory Manager Profile

1. Go to setup >> type profiles in quick find box >> click on profiles >> clone the desired profile (Standard User) >> enter profile name (Inventory Manager) >> Save.

Action	Profile Name	User License	Custom
<input type="checkbox"/> Edit   Clone	Salesforce API Only System Integrations	Salesforce Integration	<input type="checkbox"/>
<input type="checkbox"/> Edit   Clone	Silver Partner User	Silver Partner	<input type="checkbox"/>
<input type="checkbox"/> Edit   Clone	Solution Manager	Salesforce	<input type="checkbox"/>
<input type="checkbox"/> Edit   Clone	Standard Platform User	Salesforce Platform	<input type="checkbox"/>
<input checked="" type="checkbox"/> Edit   Clone	Standard User	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit   Clone	System Administrator	Salesforce	<input type="checkbox"/>

### 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	<input type="text" value="Inventory Manager"/> <span style="color: red;">8</span>

8 Save | Cancel

2. While still on the profile page, then click Edit.
3. Select the Custom App settings as default for the Medical Inventory Management.

Custom App Settings		Visible		Default		Visible		Default	
All Tabs (standard__AllTabSet)	<input checked="" type="checkbox"/>	<input type="radio"/>	Sales (standard__Lightning_Sales)	<input checked="" type="checkbox"/>	<input type="radio"/>	Sales (standard__Sales)	<input checked="" type="checkbox"/>	<input type="radio"/>	
Analytics Studio (standard__Insights)	<input checked="" type="checkbox"/>	<input type="radio"/>	Sales Console (standard__LightningSalesConsole)	<input checked="" type="checkbox"/>	<input type="radio"/>	Salesforce Chatter (standard__Chatter)	<input checked="" type="checkbox"/>	<input type="radio"/>	
App Launcher (standard__AppLauncher)	<input checked="" type="checkbox"/>	<input type="radio"/>	Salesforce Scheduler Setup (standard__LightningScheduler)	<input type="checkbox"/>	<input type="radio"/>	Sample Console (standard__ServiceConsole)	<input type="checkbox"/>	<input type="radio"/>	
Bolt Solutions (standard__LightningBolt)	<input checked="" type="checkbox"/>	<input type="radio"/>	Service (standard__Service)	<input checked="" type="checkbox"/>	<input type="radio"/>	Service Console (standard__LightningService)	<input checked="" type="checkbox"/>	<input type="radio"/>	
Community (standard__Community)	<input checked="" type="checkbox"/>	<input type="radio"/>	Site.com (standard__Sites)	<input checked="" type="checkbox"/>	<input type="radio"/>	Subscription Management (standard__RevenueCloudConsole)	<input checked="" type="checkbox"/>	<input type="radio"/>	
Content (standard__Content)	<input checked="" type="checkbox"/>	<input type="radio"/>	WDC (standard__Work)	<input checked="" type="checkbox"/>	<input type="radio"/>				
Data Manager (standard__DataManager)	<input checked="" type="checkbox"/>	<input type="radio"/>							
Digital Experiences (standard__SalesforceCMS)	<input checked="" type="checkbox"/>	<input type="radio"/>							
Lightning Usage App (standard__LightningInstrumentation)	<input checked="" type="checkbox"/>	<input type="radio"/>							
Marketing CRM Classic (standard__Marketing)	<input checked="" type="checkbox"/>	<input type="radio"/>							
Medical Inventory Management (Medical_Inventory_Management)	<input type="checkbox"/>	<input checked="" type="radio"/>							
Queue Management (standard__QueueManagement)	<input checked="" type="checkbox"/>	<input type="radio"/>							

4. Scroll down to Custom Object Permissions and Give access permissions as mentioned in the below diagram.

Custom Object Permissions		Basic Access					Data Administration							
		Read	Create	Edit	Delete	View All	Modify All		Read	Create	Edit	Delete	View All	Modify All
Inventory Transactions		<input checked="" type="checkbox"/>	Purchase Orders	<input checked="" type="checkbox"/>										
Order Items		<input checked="" type="checkbox"/>	Suppliers	<input checked="" type="checkbox"/>										
Products		<input checked="" type="checkbox"/>												

5. Change the password policies as mentioned :  
 6. User passwords expire in should be “ never expires ”.  
 7. Minimum password length should be “ 8 ”, and click save.

Password Policies	
User passwords expire in	<input type="text" value="Never expires"/>
Enforce password history	<input type="text" value="3 passwords remembered"/>
Minimum password length	<input type="text" value="8"/>
Password complexity requirement	<input type="text" value="Must include alpha and numeric characters"/>
Password question requirement	<input type="text" value="Cannot contain password"/>
Maximum invalid login attempts	<input type="text" value="10"/>
Lockout effective period	<input type="text" value="15 minutes"/>
Obscure secret answer for password resets	<input type="checkbox"/>
Require a minimum 1 day password lifetime	<input type="checkbox"/>
Don't immediately expire links in forgot password emails	<input type="checkbox"/>
<input type="button" value="Save"/> <input type="button" value="Save &amp; New"/> <input type="button" value="Cancel"/>	

## Milestone 10-Roles

### Activity 1 : Create a Purchasing Manager Role.

1. Go to quick find >> Search for Roles >> click on Set Up Roles.

2. Click on Expand All and click on add role under SVP, Sales & Marketing role.
3. Give Label as “Purchasing Manager” and Role name gets auto populated. Then click on Save.

## Activity 2 : Create a Purchasing Manager Role.

1. Go to quick find >> Search for Roles >> click on Set Up Roles.

The screenshot shows the Salesforce Setup Roles page. The sidebar on the left has a 'Roles' link highlighted with a red box. The main content area displays a 'Sample Role Hierarchy' diagram. At the top is 'Executive Staff' (CEO, President). Below it are 'CFO' and 'VP, Sales'. Under 'VP, Sales' are 'Western Sales Director' and 'Eastern Sales Director'. Under 'Western Sales Director' are 'CA Sales Rep' and 'NY Sales Rep'. Under 'Eastern Sales Director' are 'MA Sales Rep' and 'Asian Sales Rep'. Under 'International Sales Director' are 'European Sales Rep' and 'International Sales Rep'. A legend on the right explains the icons: a person icon means 'View & edit data, roll up & generate reports for all users below', a gear icon means 'Access data of other users', and a lock icon means 'Can't access data of users above or at same level'.

2. Click on Expand All and click on add role under SVP, Sales & Marketing role.
3. Give Label as “Inventory Manager” and the Role name gets auto populated. Then click on Save.

The screenshot shows the 'Role Edit' page for a 'New Role'. The 'Label' field contains 'Inventory Manager'. The 'Role Name' field contains 'Inventory\_Manager'. The 'This role reports to' field contains 'SVP, Sales & Marketing'. At the bottom, there are three buttons: 'Save' (highlighted with a red box), 'Save & New', and 'Cancel'.

## Milestone 11-Permission Sets

Activity 1 : Create a Permission Set.

1. Go to setup >> type Permission in quick find box >> Select Permission Set >> click on New.

Permission Sets

On this page you can create, view, and manage permission sets.

All Permission Sets | Edit | Delete | Create New View

New	Action	Permission Set Label	Description	License
<input type="checkbox"/>	Action	Buyer	Allows access to the store. Lets users see products and categories, make...	B2B Buyer Permission Set One Seat
<input type="checkbox"/>	Clone	Buyer Manager	Includes all Buyer capabilities, and allows access to manage carts and or...	B2B Buyer Manager Permission Set One Seat
<input type="checkbox"/>	Clone	C360 High Scale Flow Integration User	Allows integration user to access features specific to C360 High Scale Flow	Cloud Integration User
<input type="checkbox"/>	Clone	CRM User	Denotes that the user is a Sales Cloud or Service Cloud user.	CRM User
<input type="checkbox"/>	Clone	Commerce Admin	Allow access to commerce admin features.	Commerce Admin Permission Set License Seat
<input type="checkbox"/>	Clone	Contact Center Admin	Manage Service Cloud Voice contact centers that use Amazon Connect a...	Service Cloud Voice User
<input type="checkbox"/>	Clone	Contact Center Admin (Partner Telephony)	Manage Service Cloud Voice contact centers that use your preferred tele...	Service Cloud Voice User (Partner Telephony)
<input type="checkbox"/>	Clone	Contact Center Agent	Access agent features in Service Cloud Voice contact centers that use yo...	Service Cloud Voice User
<input type="checkbox"/>	Clone	Contact Center Agent (Partner Telephony)	Access agent features in Service Cloud Voice contact centers that use (P...	Service Cloud Voice User (Partner Telephony)
<input type="checkbox"/>	Clone	Contact Center Supervisor	Access supervisor features in Service Cloud Voice contact centers that us...	Service Cloud Voice User
<input type="checkbox"/>	Clone	Contact Center Supervisor (Partner Telephony)	Access supervisor features in Service Cloud Voice contact centers that us...	Service Cloud Voice User (Partner Telephony)
<input type="checkbox"/>	Clone	Data Cloud Home Org Integration User	Allows Integration user to access entities specific to Remote Data Cloud	Cloud Integration User
<input type="checkbox"/>	Clone	Delivery Estimation Service Permit Set		Cloud Integration User
<input type="checkbox"/>	Del   Clone	Experience Profile Manager		Salesforce

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 | Help for this Page

1-25 of 45 | 0 Selected | << Previous Next >> | Page 1 of 1

## 2. Enter Label as Purchase Manager Create Access >> Click on Save.

Permission Set Create

Enter permission set information

Label	Purchase Manager Create Access	Save	Cancel
API Name	Purchase_Manager	= Required Information	
Description			
Session Activation Required		<input type="checkbox"/>	

## 3. From Object Settings >> Select Order Item >> Enable for both Tab Available and Visible >> Enable Read and Create in Object Permissions >> Click on Save.

Permission Set  
Purchase Manager Create Access

Find Settings... | Clone | Delete | Edit Properties | Manage Assignments | View Summary

Permission Set Overview > Object Settings | Order Items

Order Items

Tab Settings

Available	Visible
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> <input type="checkbox"/>

Object Permissions

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

Save | Cancel

## 4. Navigate to the Permission Set detail page >> Click Manage Assignments >> Click Add Assignments >> Select the user John PurchaseM to assign the permission set to and click Next.

... > PERMISSION SET 'PURCHASE MANAGER CREATE ACCESS' > MANAGE ASSIGNMENT EXPIRATION

### Purchase Manager Create Access

Select Users to Assign

**Active Users**

Full Name ↑	Alias	Username	Role	Active	Profile
Annapurna Gurrum	AGurr	medicalinventory@sb.com		<input checked="" type="checkbox"/>	System Administrator
Chatter Expert	Chatter	chatty.00dd0000058bqlua.yrgohck7wjvo@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
Integration User	integ	integration@00dd0000058bqlua.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
John PurchaseM	jpurc	john@purchasem.com	Purchasing Manager	<input checked="" type="checkbox"/>	Purchase Manager
Security User	sec	insightssecurity@00dd0000058bqlua.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User

**Next**

5. Select No Expiration date >> Click on Assign.

... > PERMISSION SET 'PURCHASE MANAGER CREATE ACCESS' > MANAGE ASSIGNMENT EXPIRATION

### Purchase Manager Create Access

Select an Expiration Option For Assigned Users

No expiration date (Recommended)

Specify the expiration date

1 Day | 1 Week | 30 Days | 60 Days | Custom Date

Time Zone  
Select a time zone...

**Selected Users**

Full Name	Role	Profile	Active	User License	Expires On
John PurchaseM	Purchasing Manager	Purchase Manager	<input checked="" type="checkbox"/>	Salesforce	Never Expires

**Assign**

## Milestone 12-Flows

### Activity 1 : Create Flow to update the Actual Delivery Date.

1. Go to setup >> type Flow in quick find box >> Click on the Flow and Select the New Flow >> Start From Scratch .

New Flow

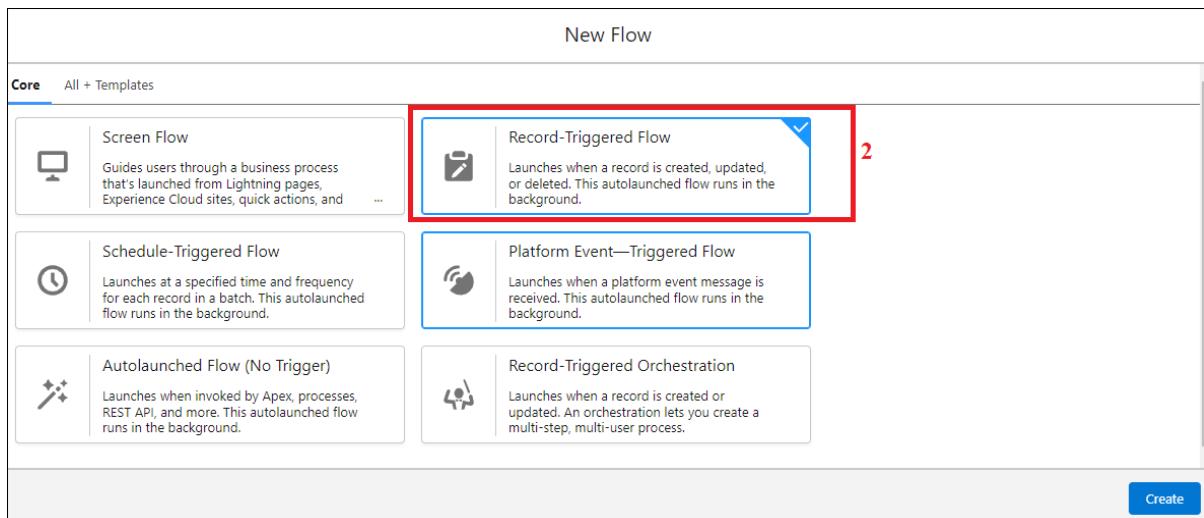
Select how you'd like to start building your automation.

**Start From Scratch**  
Select your automation type and start building on an empty canvas.

**Use a Template**  
Select a pre-built flow and customize it to fit your needs.

**Back** **Next**

2. Select the record Triggered flow.Click on create.



3. Under Object select “Purchase Order”
4. Select A record is created or updated

Select Object  
Select the object whose records trigger the flow when they're created, updated, or deleted.

\* Object  
Purchase Order 3

**Trigger the Flow When:**  
 A record is created  
 A record is updated  
 A record is created or updated 4  
 A record is deleted

5. Set Entry Conditions : None
6. Select Fast Field Updates and click on Done

**Set Entry Conditions**  
Specify entry conditions to reduce the number of records that trigger the flow and the number of times the flow is executed. Minimizing unnecessary flow executions helps to conserve your org's resources.

If you create a flow that's triggered when a record is updated, we recommend first defining entry conditions. Then select the **Only when a record is updated to meet the condition requirements** option for When to Run the Flow for Updated Records.

Condition Requirements  
None 5

**\* Optimize the Flow for:**  
**Fast Field Updates**  
Update fields on the record that triggers the flow to run. This high-performance flow runs *before* the record is saved to the database.

**Actions and Related Records**  
Update any record and perform actions, like send an email. This more flexible flow runs *after* the record is saved to the database.

Include a Run Asynchronously path to access an external system after the original transaction for the triggering record is successfully committed

7. Under the record trigger flow click on the “+” icon and select Get Records.

8. Enter Label as “ Get Purchase Record ”.
9. For Object select Purchase Order.
10. For Condition Requirements , select All Conditions are Met(AND)

For the first condition select as follows:

Field: Id

Operator: Equals

Value: {!\$Record.Id}

Get Records

\* Label: Get Purchase Record **8**

\* API Name: Get\_Purchase\_Record

Description:

Get Records of This Object

\* Object: Purchase Order **9**

Filter Purchase Order Records **10**

Condition Requirements: All Conditions Are Met (AND)

Field: Id	Operator: Equals	Value: {!\$Record.Id}
-----------	------------------	-----------------------

+ Add Condition

11. For How many Records to store Select Only the First Record.
12. For How to Store Record Data select Choose fields and let Salesforce do the rest. Select Field: Order\_Date\_\_c. Click on Done.

How Many Records to Store

Only the first record

All records

How to Store Record Data

Automatically store all fields

Choose fields and let Salesforce do the rest

Choose fields and assign variables (advanced)

Select Purchase Order Fields to Store in Variable

Field: ID

Field: Order\_Date\_\_c **11**

+ Add Field

## Milestone 13-Triggers

### Activity 1 : Create a Trigger to Calculate total amount on Order Item.

Step 1 : Login to Salesforce:

Log in to your Salesforce account with administrative privileges.

Step 2:

i)Navigate to Setup: Once logged in, click on the gear icon ?? (Setup) located at the top-right corner of the page. This will open the Setup menu.

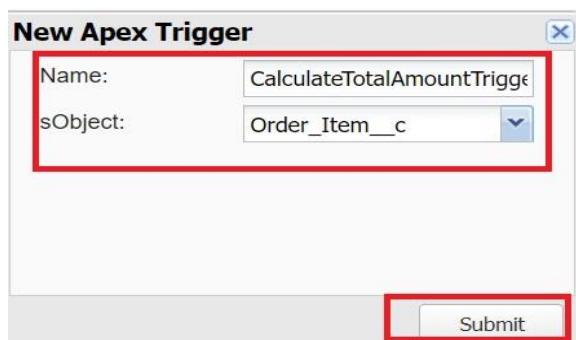
ii)Click on Developer Console: Click on the "Developer Console" option from the Setup menu. This will open the Developer Console in a new browser tab or window.

Step 3:

i) In the Developer Console window, go to the top menu and click on "File".

ii)Select New: From the dropdown menu under "File", select "New".

iii)Choose Apex Trigger: This will open a new Apex Trigger editor tab.



Create an Apex Trigger:

```
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);
```

```
}
```

Step 4:

i) In the Developer Console window, go to the top menu and click on "File".

ii) Select New: From the dropdown menu under "File", select "New".

iii) Choose Apex Class: Name it as CalculateTotalAmountHandler

```
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;
}
}
}

```

## Milestone 14-Reports

### Activity 1: Create a Purchase Orders based on Suppliers(Summary) Report

1. Click App Launcher
2. Select Medical Inventory Management App
3. Click on Reports tab
4. Click on New Report.
5. Click the report type as Purchase Orders Click Start report.

Create Report

The screenshot shows the 'Create Report' interface. On the left, there's a sidebar with categories like 'Recently Used', 'All', 'Accounts & Contacts', 'Opportunities', etc. A search bar at the top says 'Select a Report Type' with 'Purchase' typed in. Below it, a list of 'Report Type Name' and 'Category' is shown, with 'Purchase Orders' selected. To the right, a 'Details' panel shows 'Purchase Orders' as a 'Standard Report Type' with a 'Start Report' button highlighted. Other sections include 'Created By You' and 'Created By Others'.

6. Click on Filters and select as follows and click on Apply

The screenshot shows the 'Filters' section with a 'Filters' button and a dropdown menu. Under 'Show Me', 'All purchase orders' is selected. Under 'Actual Delivery Date', 'All Time' is selected. Both of these options are highlighted with red boxes.

7. Customize your report, in group rows select – Supplier ID, Purchase Order: Purchase Order ID, for columns Order Count, Total Order Cost (In this way we are making a Summary Report).

8. Click save and run
  9. Give report name – Purchase Orders based on Suppliers.
  10. Click Save
- NOTE: In this report you can see your all record of the object you selected for reporting  
(What you selects in “Select a report type option”)

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

## View Report

1. Click on App Launcher on the left side of the screen.
2. Search Medical Inventory Management App & click on it.
3. Click on Reports Tab.
4. Click on Purchase Orders based on Suppliers and see records.

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

## Activity 2: Create a Complete Purchase Details Report

1. Click App Launcher
2. Select Medical Inventory Management App
3. Click on Reports tab
4. Click on New Report.
5. Click the report type as Purchase Orders with Order Items and Product ID >> Click Start report.
6. Click on Filters and select as follows and click on Apply

Outline

**Filters**

Add filter... 

Show Me  
All purchase orders

Actual Delivery Date  
All Time

7. Customize your report, in group rows select – Supplier ID, Actual Delivery Date, Purchase Order: Purchase Order ID, for columns Product ID : Product ID, Product ID : Product Name, Order Count, Quantity Received, Amount (In this way we are making a Summary Report).

#### 8. Click save and run

## 9. Give report name – Complete Purchase Details Report

10. Click Save

The screenshot shows a Microsoft Power BI report titled "Complete Purchase Details Report" within the "Purchase Orders with Order Items and Product ID" view. The report interface includes a top navigation bar with "Products", "Purchase Orders", "Order Items", "Inventory Transactions", "Suppliers", "Reports", and "Dashboards". A search bar and various filter and charting tools are also present.

The main area displays a table with the following columns: Supplier ID, Actual Delivery Date, Purchase Order: Purchase Order ID, Product ID: Product ID, Order Count, Product ID: Product Name, Quantity Received, and Amount. The table data is organized by Supplier ID and Purchase Order ID, with sub-totals for each group.

On the left side, there are two red boxes highlighting specific sections of the report configuration:

- A red box surrounds the "Fields" pane, which contains sections for "Outline" and "Filters". The "Outline" section shows "Groups" (Supplier ID, Actual Delivery Date, Purchase Order: Purchase Order ID) and "Supplier ID" as a grouped column. The "Filters" section shows "Actual Delivery Date" and "Purchase Order: Purchase Order ID" as filtered columns.
- A red box surrounds the "Columns" pane, which lists available columns: Add column..., Product ID: Product ID, # Order Count, Product ID: Product Name, # Quantity Received, and # Amount.

At the bottom of the report, there are several buttons: Row Counts, Detail Rows, Subtotals, Grand Total, Save & Run, Save, Close, and Run. The "Save & Run" button is highlighted with a red box.

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		
				2		200	₹3,250.00		
	22/06/2024 (3)	Subtotal							
			Purchase-0001 (3)	Gen-0001	3	Syringes	5	₹25.00	
				Gen-0001	3	Syringes	10	₹50.00	
	23/06/2024 (3)	Subtotal	Cap-0001	3	Dolo 650	100	₹2,000.00		
			Purchase-0003 (3)	Subtotal					
				Syr-0001	3	Calpol 120mg Syrup	115	₹2,075.00	
	11/07/2024 (4)	Subtotal	Cap-0001	3	Dolo 650	50	₹1,000.00		
			Purchase-0004 (4)	Subtotal	Gen-0001	3	Syringes	400	₹2,000.00
						3		550	₹7,000.00
		Subtotal							
		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			
		Can-0001	4	Sunrose	300	₹1,000.00			

## Milestone14-Dashboard

## Activity 1: View Dashboard

1. Click on App Launcher on the left side of the screen.
  2. Search Medical Inventory Management & click on it.
  3. Click on Dashboard Tab.
  4. Click on Medical Inventory DashBoard see graph view of records

