

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 :

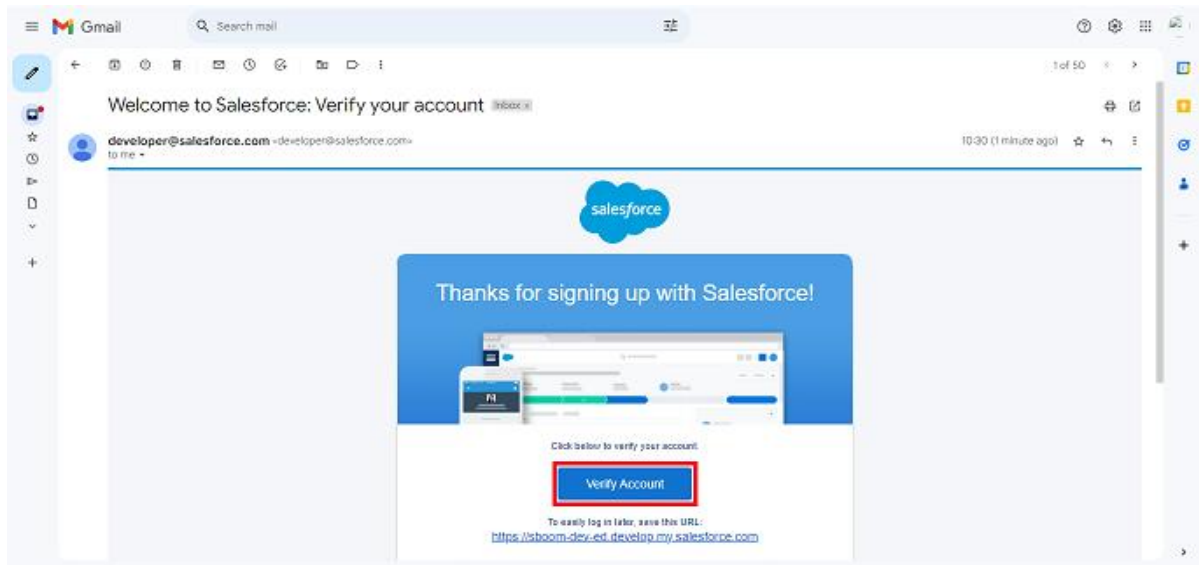
1. First name & Last name
2. Email
3. Role : Developer
4. Company : College Name
5. County : India
6. Postal Code : pin code
7. Username : should be a combination of your name and company

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

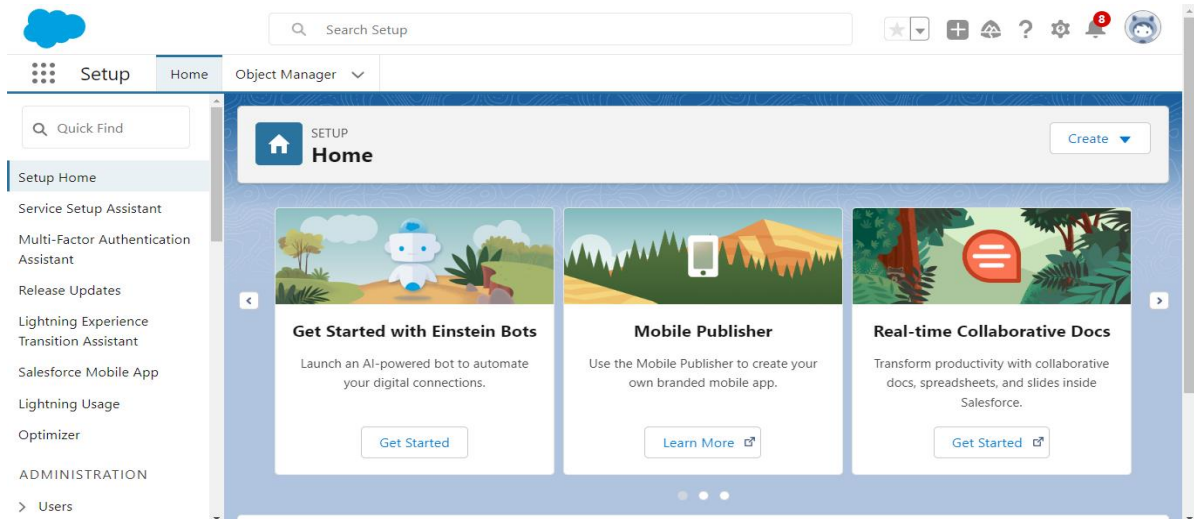
1. Go to the inbox of the email that you used while signing up. Click on the verify account to activate your account. The email may take 5-10mins.



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

A screenshot of the 'Change Your Password' form in Salesforce. The form is titled 'Change Your Password' and asks to 'Enter a new password for lead@sb.com'. It lists requirements: 8 characters, 1 letter, and 1 number, all marked with green checkmarks. The form contains four input fields: 'New Password' (with a 'Good' status), 'Confirm New Password' (with a 'Match' status), 'Security Question' (a dropdown menu showing 'In what city were you born?'), and 'Answer' (containing the text 'asdfghjkl'). A blue 'Change Password' button is at the bottom, highlighted with a red rectangular box.

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

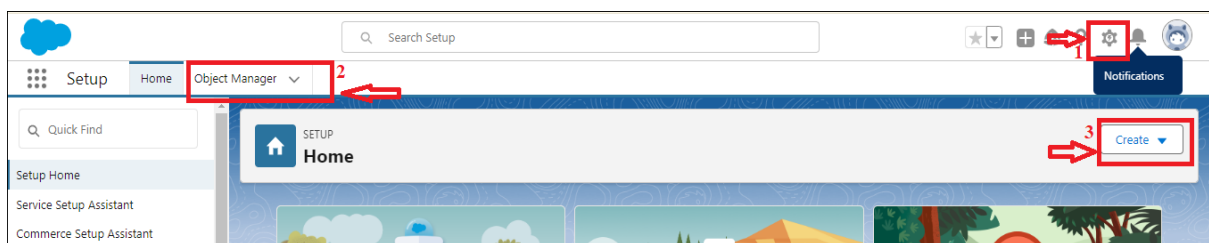


Milestone 2-Objects

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



Setup Home Object Manager

SETUP New Custom Object

Custom Object Definition Edit Save Save & New Cancel

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 ☐ Pin 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

☒ Allow Reports 8

☐ Allow Activities

☐ Track Field History

☐ Allow in Chatter Groups

☐ Enable Licensing

Deployment Status

☐ In Development

☒ Deployed

Search Status

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

☒ Allow Search 9

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

☐ Add Notes and Attachments related list to default page layout

☐ Launch New Custom Tab Wizard after saving this custom object

10 Save Save & New Cancel

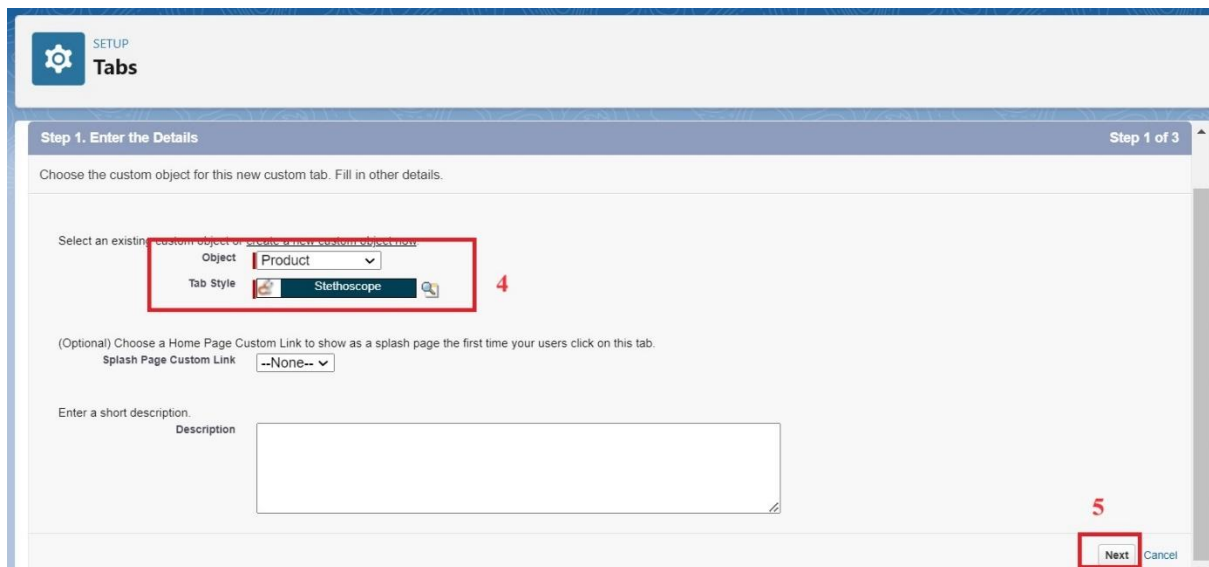
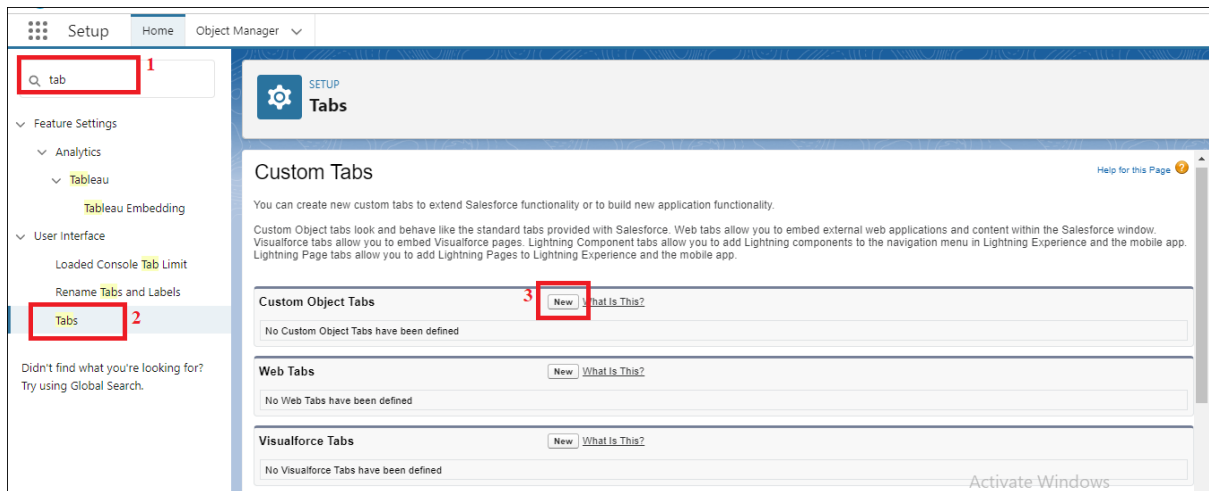
Activate Windows
Go to Settings to activate Windows.

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

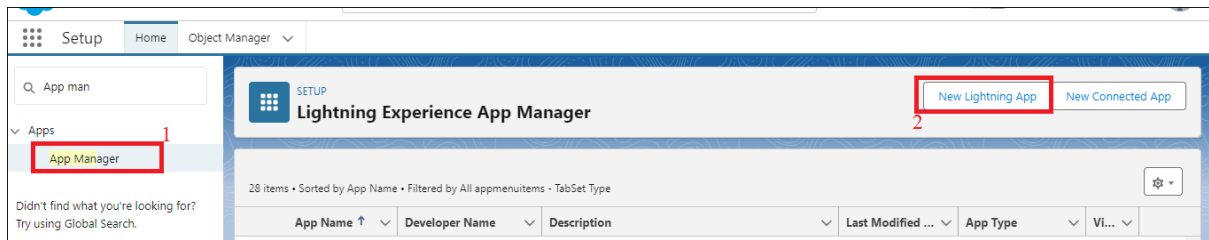
1. Go to the setup page >> type Tabs in Quick Find bar
2. Click on tabs
3. Click on New (under custom object tab).
4. Select Object(Product) >> Select the tab style
5. Click on Next >> (Add to profiles page) keep it as default >> Click on Next (Add to Custom App) uncheck the include tab .
6. Make sure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



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.



New Lightning App


App Details

3 * App Name 1
Medical Inventory Management

* Developer Name 1
Medical_Inventory_Management

Description 1
Enter a description...

App Branding

Image 1 3


Primary Color Hex Value 1
#0070D2

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

App Launcher Preview

Next

Navigation Items

Choose the items to include in the app, and arrange the order in which they appear. Users can personalize the navigation to add or move items, but users can't remove or rename the items that you add. Some navigation items are available only for phone or only for desktop. These items are dropped from the navigation bar when the app is viewed in a format that the item doesn't support.

Available Items

Create

Dash

Dashboards

Selected Items

Products

Purchase Orders

Order Items

Inventory Transactions

Suppliers

Reports

6

New Lightning App

User Profiles

Choose the user profiles that can access this app.

7

Available Profiles

system

System Administrator

Selected Profiles

Back

8 Save & Finish

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.

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

Allows users to define locations. Includes latitude and longitude components, and can be used to calculate distance.

Allows users to enter any number. Leading zeros are removed.

Allows users to enter a percentage number, for example, '10' and automatically adds the percent sign to the number.

Allows users to enter any phone number. Automatically formats it as a phone number.

Allows users to select a value from a list you define.

Allows users to select multiple values from a list you define.

Allows users to enter any combination of letters and numbers.

Allows users to enter up to 255 characters on separate lines.

Allows users to enter up to 131,072 characters on separate lines.

Allows users to enter formatted text, add images and links. Up to 131,072 characters on separate lines.

Allows users to enter any combination of letters and numbers and store them in encrypted form.

Allows users to enter a local time. For example, "2:40 PM", "14:40", "14:40:00", and "14:40:50.600" are all valid times for this field.

Allows users to enter any valid website address. When users click on the field, the URL will open in a separate browser window.

Text Area 6

Next Cancel

Step 2. Enter the details

Step 2 of 4

Previous **Next** Cancel

Field Label **Product Description** 7

Field Name Product_Description

Description

Help Text

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

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

Default Value Show Formula Editor

Use formula syntax. Enclose text and picklist value API names in double quotes ("the text"). Include numbers without quotes (25), show percentages as decimals (0.10), and express date calculations in the standard format (Today() + 7). To reference a field from a Custom Metadata type record use: \$CustomMetadata.Type__mtd.RecordAPIName.Field__c

8

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

Field Label: 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: 6 Decimal Places: 7

Field Name:

Description:

Help Text:

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

Unique: ☐ Do not allow duplicate values

External ID: ☐ Set this field as the unique record identifier from an external system

Previous 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

Quick Find:

Fields:

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

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

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.

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

Compact Layouts
1 item, Sorted by Label

Q, Quick Find **New** Compact Layout Assignment

LABEL	API NAME	PRIMARY	MODIFIED BY	LAST MODIFIED
System Default	SYSTEM	✓		

Enter Compact Layout Information ⓘ Required Information

Label **Product Compact Layout**

Name **Product_Compact_Layout**

Select Compact Layout Fields

Available Fields

- Created By
- Last Modified By
- Minimum Stock Level
- Owner
- Product ID

Add Remove

Selected Fields

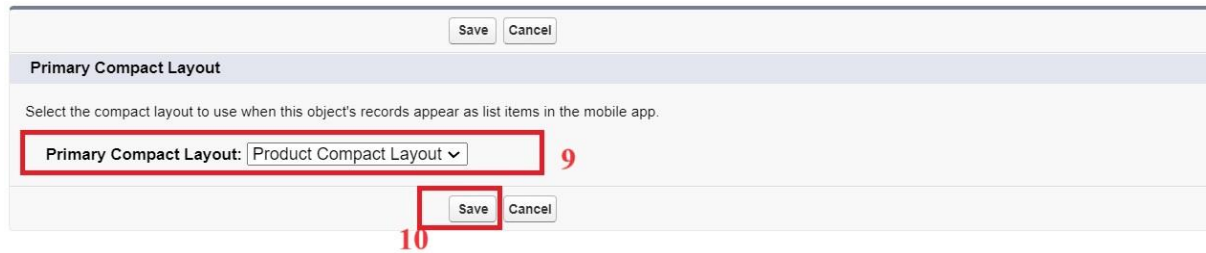
- Product Name
- Unit Price
- Current Stock Level

Top Up Down Bottom

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

Save Cancel

Product Compact Layouts
Compact Layout Assignment



Save Cancel

Primary Compact Layout

Select the compact layout to use when this object's records appear as list items in the mobile app.

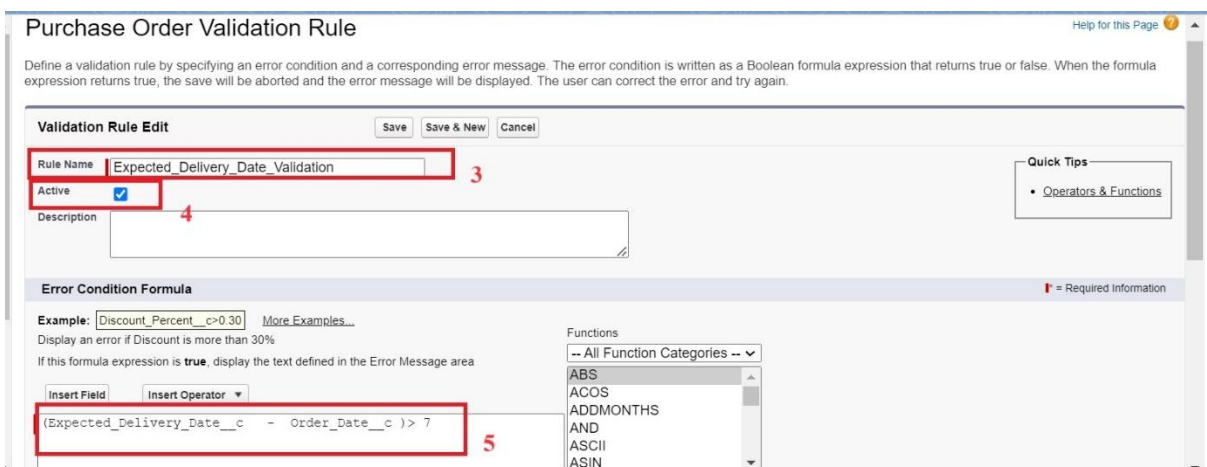
Primary Compact Layout: Product Compact Layout ▾ 9

Save Cancel 10

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 :
(Expected_Delivery_Date__c - Order_Date__c)> 7



Purchase Order Validation Rule

Define a validation rule by specifying an error condition and a corresponding error message. The error condition is written as a Boolean formula expression that returns true or false. When the formula expression returns true, the save will be aborted and the error message will be displayed. The user can correct the error and try again.

Validation Rule Edit

Save Save & New Cancel

Rule Name: Expected_Delivery_Date_Validation 3

Active: ☒ 4

Description:

Error Condition Formula

Example: Discount_Percent__c>0.30 More Examples...

Display an error if Discount is more than 30%

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

Insert Field Insert Operator ▾

(Expected_Delivery_Date__c - Order_Date__c)> 7 5

Functions

-- All Function Categories --

ABS
ACOS
ADDMONTHS
AND
ASCII
ASIN

Quick Tips

- Operators & Functions

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.

Setup Home Object Manager

Q Profiles

Users

Profiles

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

SETUP Profiles

Profiles

All Profiles Edit Delete Create New View

New Profile

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 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 Inventory Manager

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.

SETUP Profiles

Custom App Settings ! = Required Information

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

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

Password Policies

User passwords expire in **Never expires** ▼

Enforce password history **3 passwords remembered** ▼

Minimum password length **8**

Password complexity requirement **Must include alpha and numeric characters** ▼

Password question requirement **Cannot contain password** ▼

Maximum invalid login attempts **10** ▼

Lockout effective period **15 minutes** ▼

Obscure secret answer for password resets ☐

Require a minimum 1 day password lifetime ☐

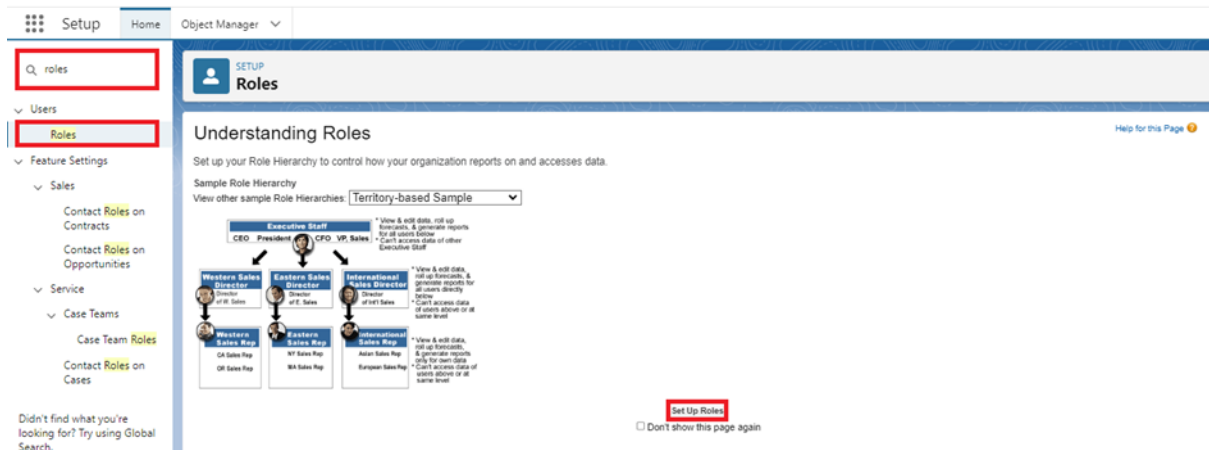
Don't immediately expire links in forgot password emails ☐ [i](#)

Save Save & New Cancel

Milestone 10-Roles

Activity 1 : Create a Purchasing Manager Role.

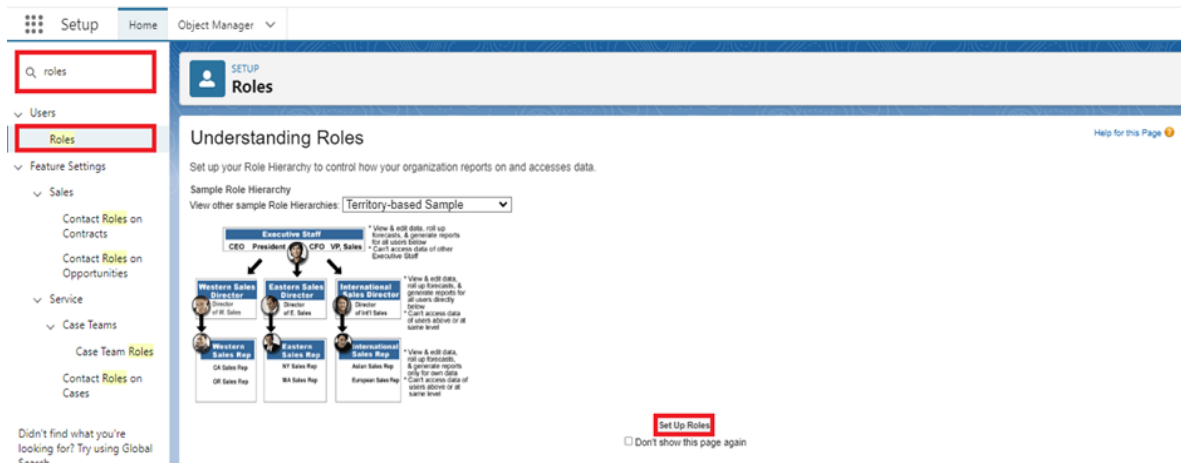
- Go to quick find >> Search for Roles >> click on Set Up Roles.



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.

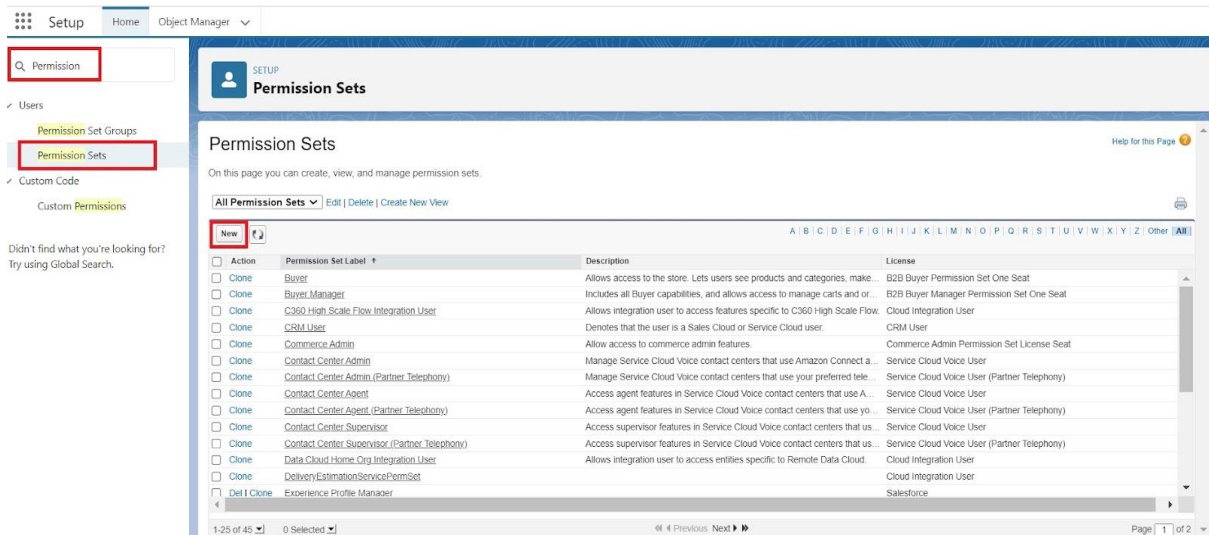


2. Click on Expand All and click on add role under SVP, Sales & Marketing role.
3. Give Label as “Inventory Manager” and the Role name gets auto populated. Then click on Save.

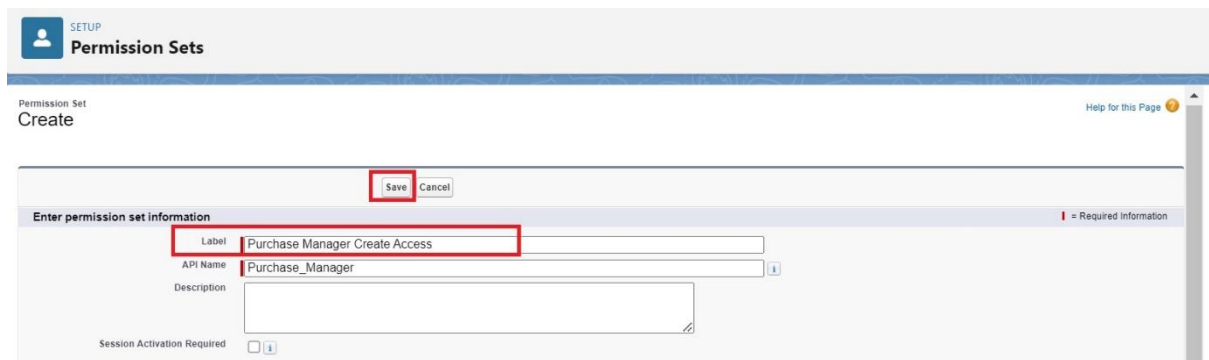
Milestone 11-Permission Sets

Activity 1 : Create a Permission Set.

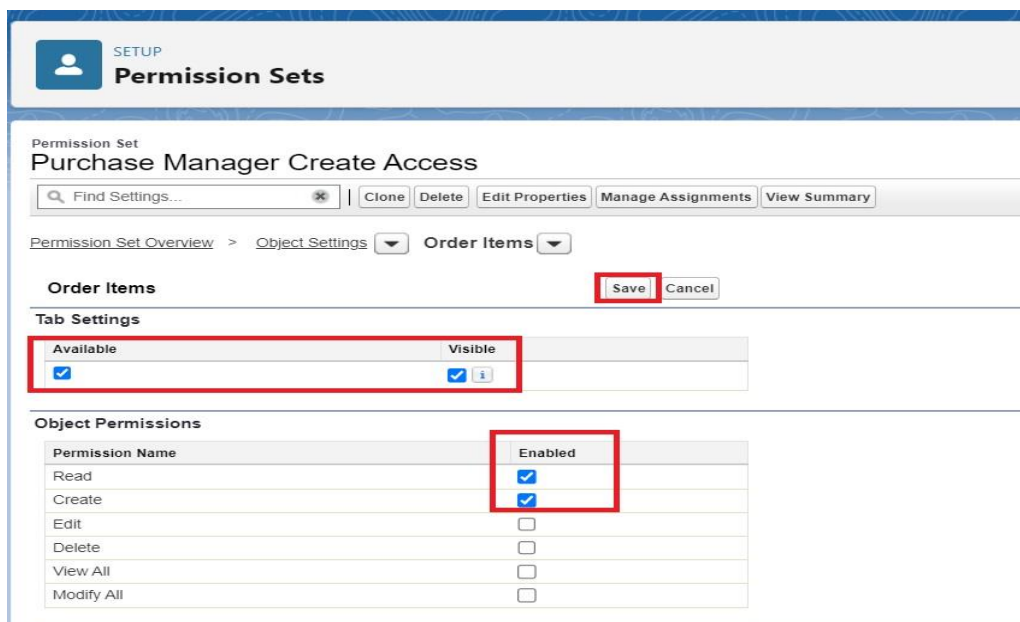
1. Go to setup >> type Permission in quick find box >> Select Permission Set >> click on New.



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



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



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 ▼

1 item selected

Search this list...

	Full Name ↑	Alias	Username	Role	Active	Profile
<input type="checkbox"/>	Annapurna Gurram	AGurr	medicalinventory@sb.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>	Chatter Expert	Chatter	chatty.00ddl0000058bqluaa.yrgohck7wjvo@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/>	Integration User	integ	integration@00ddl0000058bqluaa.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input checked="" type="checkbox"/>	John PurchaseM	jpurc	john@purchasem.com	Purchasing Manager	<input checked="" type="checkbox"/>	Purchase Manager
<input type="checkbox"/>	Security User	sec	insightssecurity@00ddl0000058bqluaa.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User

Cancel

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

☐ 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	✓	Salesforce	Never Expires

Cancel

Back

Assign

Milestone 12-Flows

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

- 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.

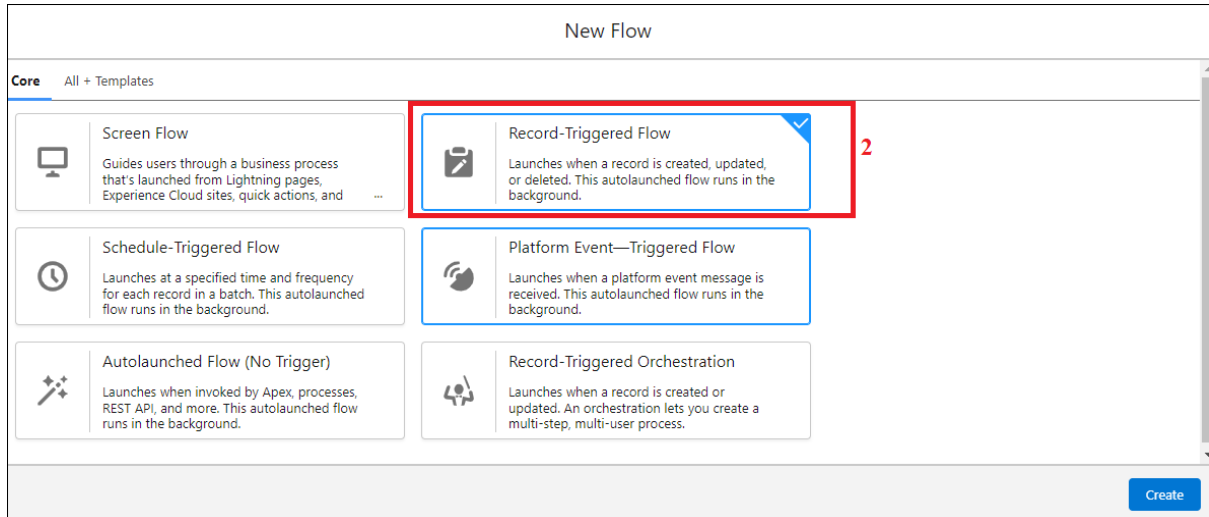
☐ Use a Template

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

Back

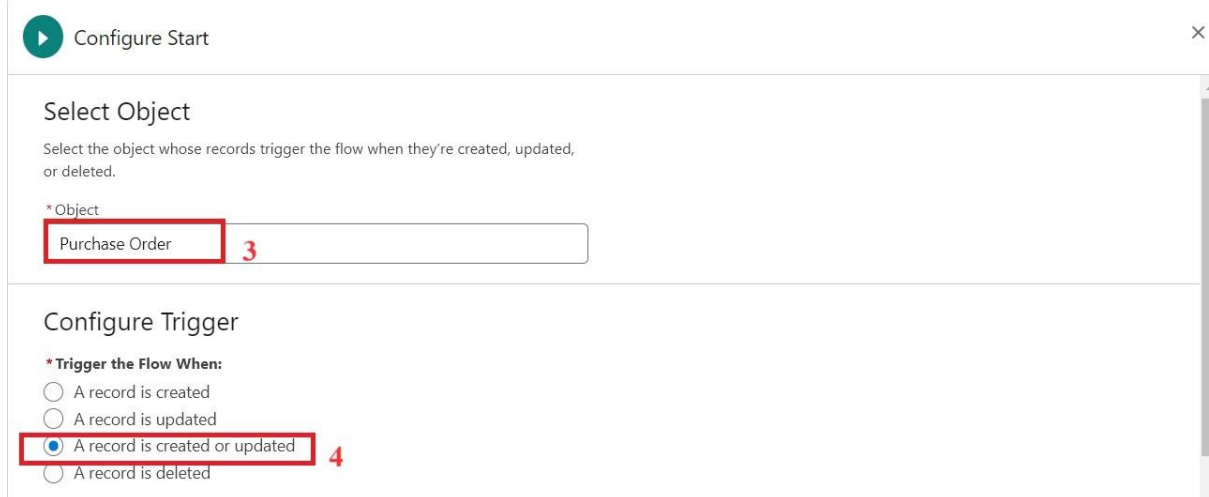
Next

- Select the record Triggered flow.Click on create.



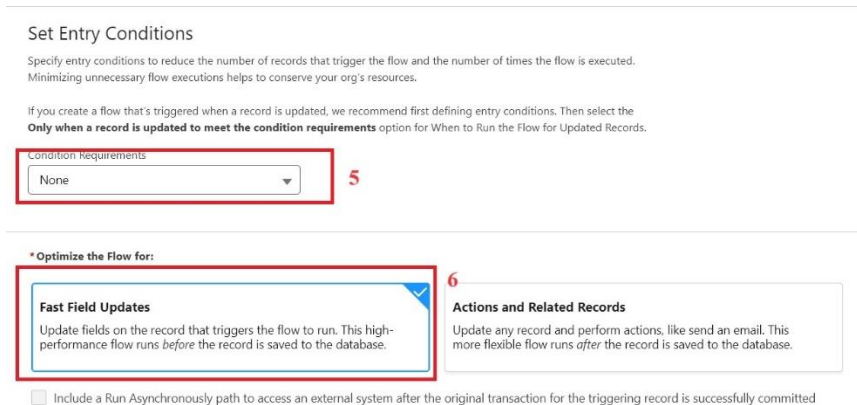
3. Under Object select “Purchase Order”

4. Select A record is created or updated



5. Set Entry Conditions : None

6. Select Fast Field Updates and click on Done



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	Operator	Value
Id	Equals	Aa \$Record > 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

+ 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.

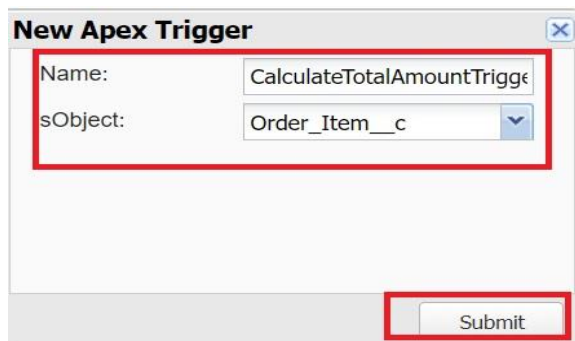
ii) Click on Developer Console: Click on the "Developer Console" option from the Setup menu. This will open the Developer Console in a new browser tab or window.

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);
    }

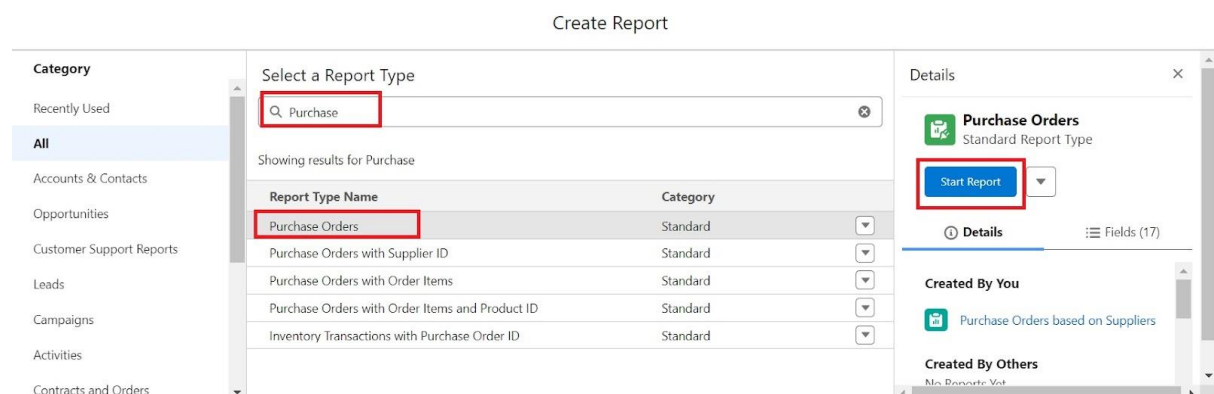
    // Update Purchase Orders if there are any changes
    if (!purchaseToUpdate.isEmpty()) {
        update purchaseToUpdate;
    }
}
}
}
}

```

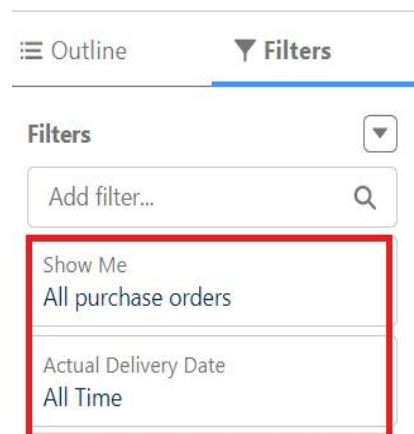
Milestone 14-Reports

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.

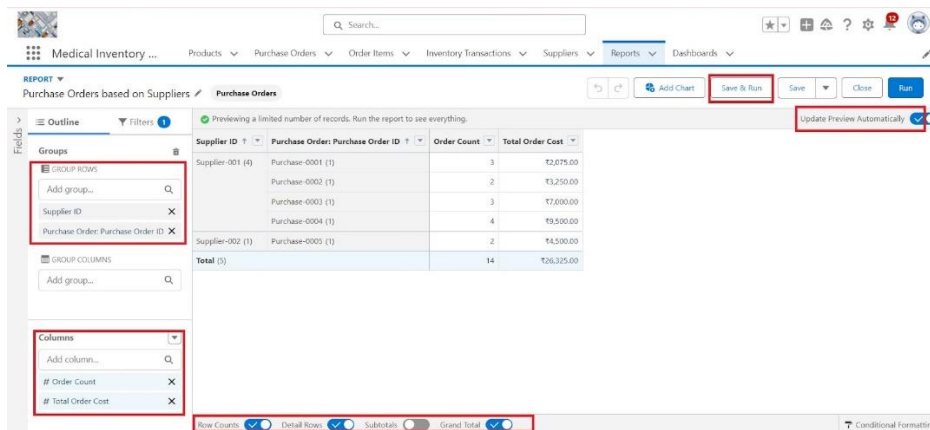


6. Click on Filters and select as follows and click on Apply



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”)



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.

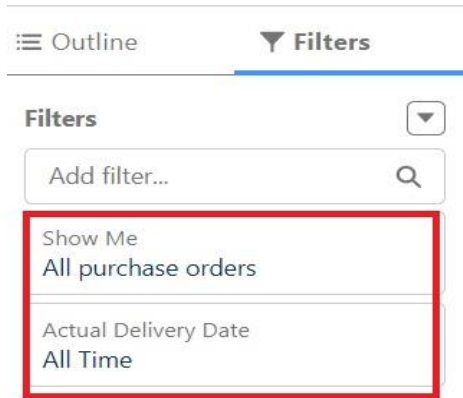
Report: Purchase Orders
Purchase Orders based on Suppliers

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

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

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



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

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



Search...



Medical Inventory Manage... Products Purchase Orders Order Items Inventory Transactions Suppliers Medical Inventory Dashboard

Dashboard
Medical Inventory DashBoard
Last refreshed 4 days ago. Refresh this dashboard to see the latest data.
As of Oct 27, 2025, 7:49 AM Viewing as Raveena K

Refresh Edit Subscribe

