

MEDICAL INVENTORY MANAGEMENT

College Name: Sree Narayana Guru College

College Code: bru36

Team ID: **77521D4FA2C134892EE4E19684F07EDA**

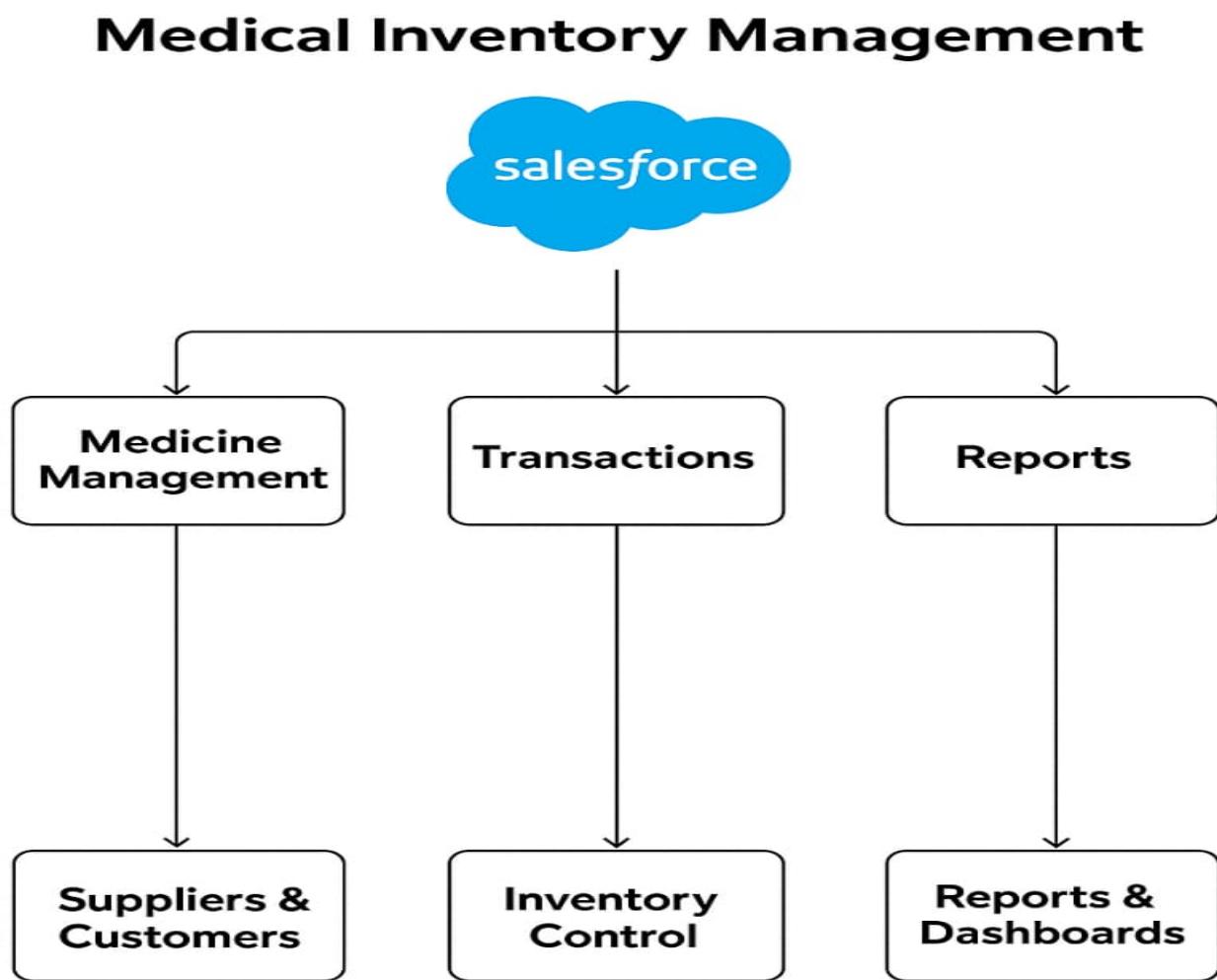
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1. INTRODUCTION

1.1. Project Overview

The Medical Inventory Management System is a Salesforce-based application designed to manage and streamline the flow of medicines, equipment, and supplies in hospitals, pharmacies, and clinics. The project leverages Salesforce CRM features like custom objects, relationships, reports, dashboards, and automation tools to ensure accurate tracking, reduce stockouts, and improve overall efficiency in managing medical inventory.



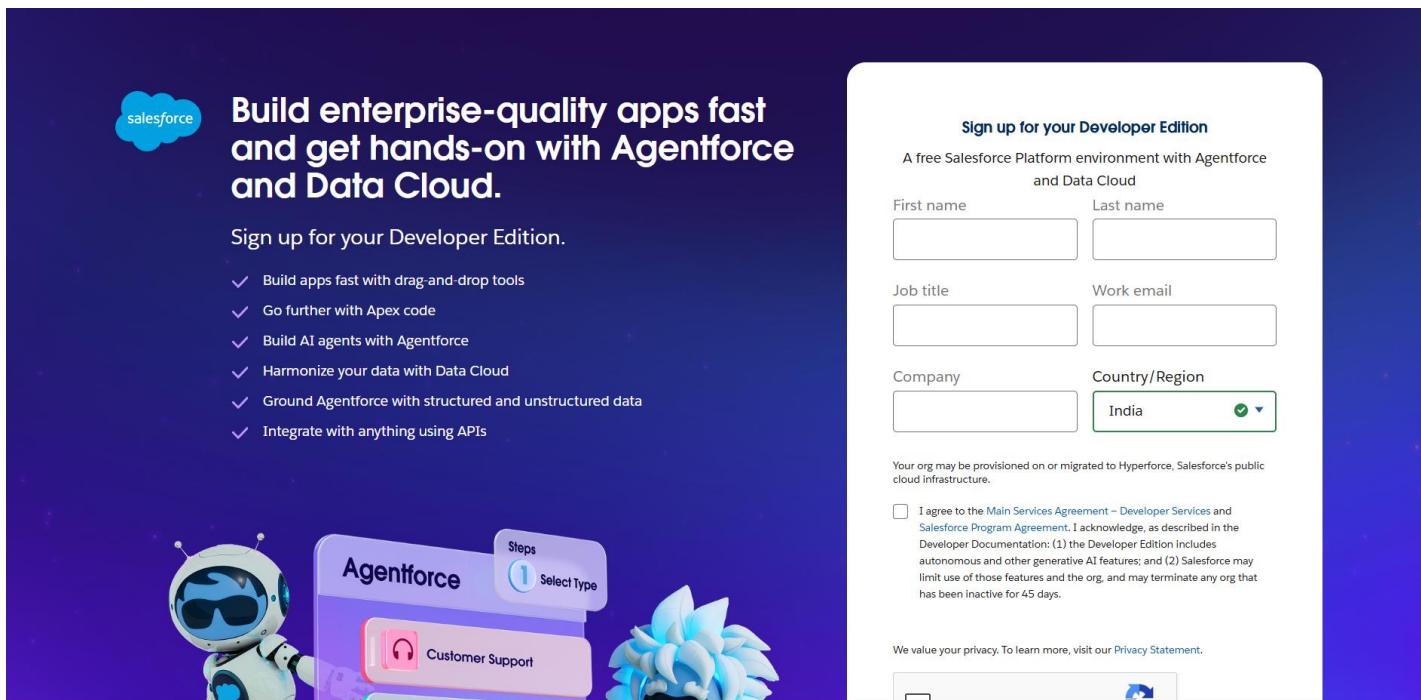
1.2 Purpose

The purpose of this project is to design and implement a Salesforce-based Medical Inventory Management System that ensures efficient tracking, management, and monitoring of medicines, medical supplies, and related transactions within healthcare organizations such as hospitals, pharmacies, and clinics.

2. Development Phase

Creating a developer account : We can create an developers account in salesforce by using the following url

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



Creating objects:- We created object named Products , Purchase Order, Order Item, Inventory Transaction and Supplier.

Cloud icon

Setup Home Object Manager

Search Setup

Star, Plus, Question, Gear, Bell, User icons

SETUP > OBJECT MANAGER
Product

Details

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

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

Edit Delete

Cloud icon

Setup Home Object Manager

Search Setup

Star, Plus, Question, Gear, Bell, User icons

SETUP > OBJECT MANAGER
Purchase Order

Details

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

Details

Description
API Name **Purchase_Order_c**
Custom ✓
Singular Label Purchase Order
Plural Label Purchase Orders

Enable Reports ✓
Track Activities ✓
Track Field History
Deployment Status Deployed
Help Settings Standard salesforce.com Help Window

Edit Delete

Cloud icon

Setup Home Object Manager

SETUP > OBJECT MANAGER
Order Item

Details

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

Details

Description
API Name: Order_Item_c
Custom
✓
Singular Label: Order Item
Plural Label: Order Items

Enable Reports
✓
Track Activities
✓
Track Field History
✓
Deployment Status: Deployed
Help Settings: Standard salesforce.com Help Window

Edit Delete

Cloud icon

Setup Home Object Manager

SETUP > OBJECT MANAGER
Inventory Transaction

Details

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

Details

Description
API Name: Inventory_Transaction_c
Custom
✓
Singular Label: Inventory Transaction
Plural Label: Inventory Transactions

Enable Reports
✓
Track Activities
✓
Track Field History
✓
Deployment Status: Deployed
Help Settings: Standard salesforce.com Help Window

Edit Delete

SETUP > OBJECT MANAGER
Supplier

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

<https://orgfarm-f851a23daa-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01loK0000001vKz/Details/view>

Creating Tabs :- We have created the tabs for the custom made objects Products , Purchase Order, Order Item, Inventory Transaction and Supplier.

Student - Lightning Experience | Salesforce - Tabs | Salesforce

Search Setup

Setup Home Object Manager

tab

Tabs

Custom Tabs

You can create new custom tabs to extend Salesforce functionality or to build new application functionality.

Custom Object tabs look and behave like the standard tabs provided with Salesforce. Web tabs allow you to embed external web applications and content within the Salesforce window. Visualforce tabs allow you to embed Visualforce pages. Lightning Component tabs allow you to add Lightning components to the navigation menu in Lightning Experience and the mobile app. Lightning Page tabs allow you to add Lightning Pages to Lightning Experience and the mobile app.

Custom Object Tabs

Action	Label	Tab Style	Description
Edit Del	Inventory Transactions	Bell	
Edit Del	Order Items	Lightning	
Edit Del	Products	Bell	
Edit Del	Purchase Orders	Apple	
Edit Del	Suppliers	Desk	

Web Tabs

No Web Tabs have been defined

Visualforce Tabs

No Visualforce Tabs have been defined

Finance headline India's new jobs... 19:38 10-09-2025

Creating the Lightning app :- We created an lightning app named Medical Inventory Management with items Products, Purchase Orders, Order Items, Inventory Transactions, Suppliers, Reports, and Dashboards and Profiles with System Administrator.

The screenshot shows the 'App Details & Branding' section of the Lightning App Builder. The 'App Name' is set to 'Medical Inventory Management'. The 'Developer Name' is 'Medical_Inventory_Management'. The 'Image' is a circular logo with blue and green arrows pointing right. The 'Primary Color Hex Value' is '#0070D2'. The 'Description' is 'Medical Inventory Management App'. The 'App Launcher Preview' shows the app icon and name. The status bar at the bottom indicates 'Very humid Now' and the date '10-09-2025'.

The screenshot shows the 'Navigation Items' section of the Lightning App Builder. The 'Available Items' list includes Accounts, Activation Targets, Activations, Active Scratch Orgs, All Sites, Alternative Payment Methods, Analytics, App Launcher, Appointment Categories, Appointment Invitations, Home, Products, Purchase Orders, Order Items, Inventory Transactions, Suppliers, Reports, and Dashboards. The 'Selected Items' list contains Home, Products, Purchase Orders, Order Items, Inventory Transactions, Suppliers, Reports, and Dashboards. The status bar at the bottom indicates 'Trending videos Dogs Adopt a W...' and the date '10-09-2025'.

The screenshot shows the Lightning App Builder interface for 'Medical Inventory Management'. The left sidebar has 'User Profiles' selected under 'App Settings'. The main area is titled 'User Profiles' and contains a section for 'Available Profiles' and 'Selected Profiles'. The 'Available Profiles' list includes: Analytics Cloud Integration User, Analytics Cloud Security User, Anypoint Integration, Authenticated Website, B2B Reordering Portal Buyer Profile, Contract Manager, Custom: Marketing Profile, Custom: Sales Profile, Custom: Support Profile, and Customer Community Login User. The 'Selected Profiles' list contains 'System Administrator' and 'Inventory Manager'. A search bar at the top says 'Type to filter list...'.

Configuring Fields and Relationship :- We created various fields and relationship for each custom objects.

The screenshot shows the Salesforce Object Manager for the 'Product' object. The left sidebar lists various setup categories like Page Layouts, Lightning Record Pages, etc. The main area is titled 'Fields & Relationships' and shows a table of fields for the 'Product' object. The table columns are: FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The fields listed are: Created By (CreatedById, Lookup(User)), Current Stock Level (Current_Stock_Level__c, Number(18, 0)), Last Modified By (LastModifiedByld, Lookup(User)), Minimum Stock Level (Minimum_Stock_Level__c, Number(18, 0)), Owner (OwnerId, Lookup(User/Group)), Product Description (Product_Description__c, Text Area(255)), Product ID (Name, Text(80)), Product Name (Product_Name__c, Text(255)), and Unit Price (Unit_Price__c, Currency(16, 2)). A 'Quick Find' search bar and buttons for 'New', 'Deleted Fields', 'Field Dependencies', and 'Set History Tracking' are at the top of the table.

Purchase Order | Salesforce

orgfarm-f851a23daa-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgK000001vLG9/FieldsAndRelationships/view

Guest (2)

Cloud Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER
Purchase Order

Fields & Relationships
10 Items, Sorted by Field Label

			Quick Find	New	Deleted Fields	Field Dependencies	Set History Tracking
Actual Delivery Date	Actual_Delivery_Date__c	Date					
Created By	CreatedBy	Lookup(User)					
Expected Delivery Date	Expected_Delivery_Date__c	Date					
Last Modified By	LastModifiedBy	Lookup(User)					
Order Count	Order_Count__c	Roll-Up Summary (COUNT Order Item)					
Order Date	Order_Date__c	Date					
Owner	OwnerId	Lookup(User,Group)					
Purchase Order ID	Name	Text(80)					
Supplier ID	Supplier_ID__c	Lookup(Supplier)					
Total Order Cost	Total_Order_Cost__c	Currency(16, 2)					

28°C Heavy rain

Search web & PC

2002 IN 10-09-2025

Inventory Transaction | Salesforce

orgfarm-f851a23daa-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgK000001vJN/FieldsAndRelationships/view

Guest (2)

Cloud Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER
Inventory Transaction

Fields & Relationships
8 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedBy	Lookup(User)		
Last Modified By	LastModifiedBy	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		
Purchase Order ID	Purchase_Order_ID__c	Lookup(Purchase Order)		
Total Order Cost	Total_Order_Cost__c	Formula (Currency)		
Transaction Date	Transaction_Date__c	Date		
Transaction ID	Name	Text(80)		
Transaction Type	Transaction_Type__c	Picklist		

28°C Heavy rain

Search web & PC

2005 IN 10-09-2025

Supplier | Salesforce

orgfarm-f851a23daa-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgK000001vKz/FieldsAndRelationships/view

Guest (2)

Cloud Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER
Supplier

Fields & Relationships
9 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Address	Address_c	Text(100)		
Contact Person	Contact_Person_c	Text(50)		
Created By	CreatedById	Lookup(User)		
Email	Email_c	Email		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Phone Number	Phone_Number_c	Phone		
Supplier ID	Name	Text(80)		✓
Supplier Name	Supplier_Name_c	Text(50)		

28°C Heavy rain

Search web & PC

ENG IN 10-09-2025

Order Item | Salesforce

orgfarm-f851a23daa-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgK000001vHl/FieldsAndRelationships/view

Guest (2)

Cloud Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER
Order Item

Fields & Relationships
9 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Amount	Amount_c	Formula (Currency)		
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Order Item ID	Name	Text(80)		✓
Product ID	Product_ID_c	Lookup(Product)		✓
Purchase Order ID	Purchase_Order_ID_c	Master-Detail(Purchase Order)		✓
Quantity Ordered	Quantity_Ordered_c	Number(18, 0)		
Quantity Received	Quantity_Received_c	Number(10, 0)		
Unit Price	Unit_Price_c	Formula (Currency)		

28°C Heavy rain

Search web & PC

ENG IN 10-09-2025

Setup of the Page Layout:- We edited the Page Layout for the custom objects.

The screenshot shows the Salesforce Setup interface for editing the page layout of the 'Product' object. The left sidebar lists various configuration options like Details, Fields & Relationships, Page Layouts, Lightning Record Pages, etc. The 'Page Layouts' section is selected. The main area displays the page layout editor with tabs for Save, Quick Save, Preview As..., Cancel, Undo, Redo, and Layout Properties. A 'Fields' section contains a table with columns for Field Name, Last Modified By, and Description. Below this are sections for Information, System Information, Custom Links, and Mobile Cards. A related lists section is also present. The bottom status bar shows weather (28°C Heavy rain), system info (Search web & PC, various icons), and a timestamp (20:09 IN 10-09-2025).

The screenshot shows the Salesforce Setup interface for editing the page layout of the 'Purchase Order' object. The left sidebar lists various configuration options like Details, Fields & Relationships, Page Layouts, Lightning Record Pages, etc. The 'Page Layouts' section is selected. The main area displays the page layout editor with tabs for Save, Quick Save, Preview As..., Cancel, Undo, Redo, and Layout Properties. A 'Fields' section contains a table with columns for Field Name, Last Modified By, and Description. Below this are sections for Purchase Order Detail, Information, System Information, Custom Links, and Mobile Cards. A related lists section is also present. The bottom status bar shows weather (28°C Heavy rain), system info (Search web & PC, various icons), and a timestamp (20:09 IN 10-09-2025).

Inventory Transaction | Salesforce

orgfarm-f851a23daa-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgK000001vJN/PageLayouts/00hgK000006djWTOAY/view Guest (2)

Cloud Search Setup Layout Properties

SETUP > OBJECT MANAGER

Inventory Transaction

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

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

Fields

Section	Owner	Transaction ID
Blank Space	Purchase Order ID	Transaction Type
Created By	Total Order Cost	
Last Modified By	Transaction Date	

Quick Find Field Name

Information (Header visible on edit only)

- ★ Transaction ID Sample Text
- Purchase Order ID Sample Text
- Transaction Type Sample Text
- Transaction Date 9/10/2025
- Total Order Cost \$123.45

Owner Sample Text

System Information (Header visible on edit only)

- Created By Sample Text
- Last Modified By Sample Text

Custom Links (Header visible on edit only)

Mobile Cards (Salesforce mobile only) i

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

Related Lists

28°C Heavy rain Search web & PC ENG IN 2012 10-09-2025

Supplier | Salesforce

orgfarm-f851a23daa-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgK000001vKz/PageLayouts/00hgK000006djZhQAI/view Guest (2)

Cloud Search Setup Layout Properties

SETUP > OBJECT MANAGER

Supplier

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

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

Fields

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

Quick Find Field Name

Information (Header visible on edit only)

- ★ Supplier ID Sample Text
- Supplier Name Sample Text
- Contact Person Sample Text

★ Phone Number 1-415-555-1212

Email sarah.sample@company.com

Address Sample Text

Owner Sample Text

System Information (Header visible on edit only)

- Created By Sample Text
- Last Modified By Sample Text

Custom Links (Header visible on edit only)

Mobile Cards (Salesforce mobile only) i

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

Related Lists

28°C Heavy rain Search web & PC ENG IN 2013 10-09-2025

Order Item | Salesforce

SETUP > OBJECT MANAGER
Order Item

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

Scoping Rules

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

Fields

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

Information (Header visible on edit only)

Order Item ID: Sample Text
Amount: \$123.45

Purchase Order ID: Sample Text

Product Details

Product ID	Sample Text	Quantity Ordered	91,636
Unit Price	\$123.45	Quantity Received	13,902

System Information (Header visible on edit only)

Created By: Sample Text
Last Modified By: Sample Text

Custom Links (Header visible on edit only)

Mobile Cards (Salesforce mobile only)

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

28°C Heavy rain

Search web & PC

ENG IN 10-09-2025 20:10

Compact Layout:-We created Compact Layout for the Custom object Product and Purchase Order.

SETUP > OBJECT MANAGER
Product

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

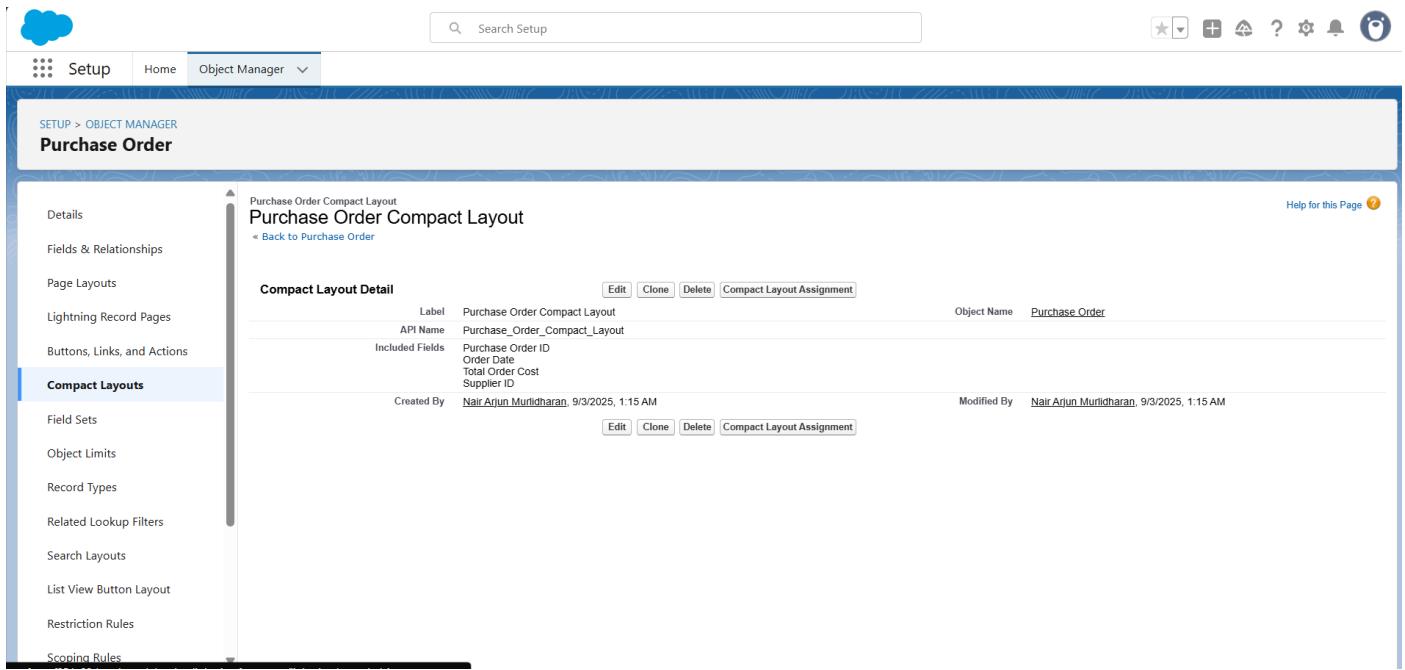
Scoping Rules

Product Compact Layout

Help for this Page

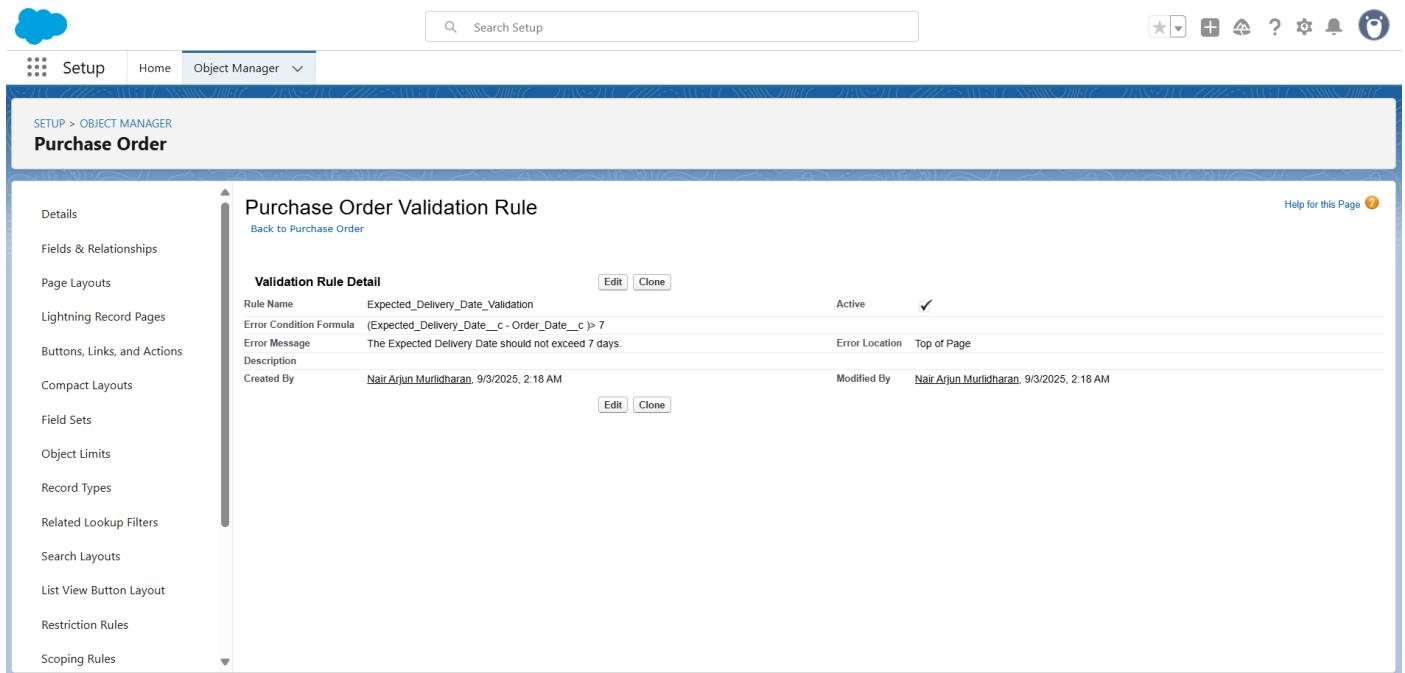
Compact Layout Detail

Label	Product Compact Layout	Object Name	Product
API Name	Product_Compact_Layout		
Included Fields	Product Name Unit Price Current Stock Level		
Created By	Nair Arjun Murlidharan, 9/3/2025, 1:10 AM	Modified By	Nair Arjun Murlidharan, 9/3/2025, 1:10 AM



The screenshot shows the Salesforce Setup interface for the Purchase Order object. The left sidebar has a 'Compact Layouts' section selected. The main content area displays the 'Purchase Order Compact Layout' detail page. It includes fields for Label (Purchase Order Compact Layout), API Name (Purchase_Order_Compact_Layout), Included Fields (Purchase Order ID, Order Date, Total Order Cost, Supplier ID), and Created By (Nair Arjun Muridharan, 9/3/2025, 1:15 AM). Buttons for Edit, Clone, Delete, and Compact Layout Assignment are available.

Validation Rule:- We created an validation rule under Purchase order for expected delivery date.



The screenshot shows the Salesforce Setup interface for the Purchase Order object. The left sidebar has a 'Validation Rules' section selected. The main content area displays the 'Purchase Order Validation Rule' detail page. It includes fields for Rule Name (Expected_Delivery_Date_Validation), Error Condition Formula ((Expected_Delivery_Date__c - Order_Date__c) > 7), Error Message (The Expected Delivery Date should not exceed 7 days.), and Description. The rule is Active and located at the Top of Page. It was created by Nair Arjun Muridharan on 9/3/2025, 2:18 AM. Buttons for Edit, Clone, and Delete are available.

Profiles:- We created Profiles named Inventory Manager and Purchase Manager.

The screenshot shows the Salesforce Setup interface with the 'Profiles' page selected. The 'Inventory Manager' profile is displayed. Key details include:

- Name:** Inventory Manager
- User License:** Salesforce
- Description:** (empty)
- Created By:** Nair Arjun Muridharan, 9/3/2025, 7:12 AM
- Modified By:** Nair Arjun Muridharan, 9/3/2025, 7:19 AM

Page Layouts

Object	Layout Type	Assignment	Location Group Assignment
Global	Global Layout	[View Assignment]	Location Group Assignment Layout [View Assignment]
Email Application	Not Assigned	[View Assignment]	Macro Layout [View Assignment]
Home Page Layout	Home Page Default	[View Assignment]	Namespace Registry Layout [View Assignment]
Account	Account Layout	[View Assignment]	Object Milestone Layout [View Assignment]
Active Scratch Org	Active Scratch Org Layout	[View Assignment]	Operating Hours Layout [View Assignment]
Alternative Payment Method	Alternative Payment Method Layout	[View Assignment]	Opportunity Layout [View Assignment]

The screenshot shows the Salesforce Setup interface with the 'Profiles' page selected. The 'Purchase Manager' profile is displayed. Key details include:

- Name:** Purchase Manager
- User License:** Salesforce
- Description:** (empty)
- Created By:** Nair Arjun Muridharan, 9/3/2025, 7:20 AM
- Modified By:** Nair Arjun Muridharan, 9/3/2025, 7:23 AM

Page Layouts

Object	Layout Type	Assignment	Location Group Assignment
Global	Global Layout	[View Assignment]	Location Group Assignment Layout [View Assignment]
Email Application	Not Assigned	[View Assignment]	Macro Layout [View Assignment]
Home Page Layout	Home Page Default	[View Assignment]	Namespace Registry Layout [View Assignment]
Account	Account Layout	[View Assignment]	Object Milestone Layout [View Assignment]
Active Scratch Org	Active Scratch Org Layout	[View Assignment]	Operating Hours Layout [View Assignment]
Alternative Payment Method	Alternative Payment Method Layout	[View Assignment]	Opportunity Layout [View Assignment]

Roles:- We created an Roles of Inventory Management and Purchasing Management.

Cloud icon

Setup Home Object Manager

Search Setup

Users Roles Feature Settings Sales Service Case Teams Didn't find what you're looking for? Try using Global Search.

SETUP Roles

Collapse All Expand All

- Sree Narayana Guru College**
 - Add Role
 - CEO** Edit | Del | Assign
 - Add Role
 - CFO** Edit | Del | Assign
 - Add Role
 - COO** Edit | Del | Assign
 - Add Role
 - SVP_Customer Service & Support** Edit | Del | Assign
 - Add Role
 - Customer Support_International** Edit | Del | Assign
 - Add Role
 - Customer Support_North America** Edit | Del | Assign
 - Add Role
 - Installation & Repair Services** Edit | Del | Assign
 - Add Role
 - SVP_Human Resources** Edit | Del | Assign
 - Add Role
 - SVP_Sales & Marketing** Edit | Del | Assign
 - Add Role
 - Inventory Manager** Edit | Del | Assign
 - Add Role
 - Purchasing Manager** Edit | Del | Assign
 - Add Role
 - VP_North American Sales** Edit | Del | Assign
 - Add Role
 - VP_International Sales** Edit | Del | Assign
 - Add Role
 - VP_Marketing** Edit | Del | Assign

Cloud icon

Setup Home Object Manager

Search Setup

Users Roles Feature Settings Sales Service Case Teams Didn't find what you're looking for? Try using Global Search.

SETUP Roles

Role Inventory Manager

Help for this Page ?

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: Sree Narayana Guru College » CEO » SVP_Sales & Marketing » Inventory Manager
Siblings: VP_NorthAmerican Sales, VP_Marketing, VP_International Sales, Purchasing Manager

Users in Inventory Manager Role ()

Role Detail		Edit	Delete
Label	Inventory Manager	Role Name	Inventory_Manager
This role reports to	SVP_Sales & Marketing	Role Name as displayed on reports	
Modified By	Nair Arjun Murlidharan, 9/3/2025, 5:57 AM	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		

Users in Inventory Manager Role

Assign Users to Role | New User

Users in Inventory Manager Role Help ?

No records to display

Cloud icon

Setup Home Object Manager

Search Setup

Users Roles Feature Settings Sales Service Case Teams Didn't find what you're looking for? Try using Global Search.

SETUP Roles

Role Purchasing Manager

Help for this Page ?

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: Sree Narayana Guru College » CEO » SVP_Sales & Marketing » Purchasing Manager
Siblings: VP_North American Sales, VP_Marketing, VP_International Sales, Inventory Manager

Users in Purchasing Manager Role ()

Role Detail		Edit	Delete
Label	Purchasing Manager	Role Name	Purchasing_Manager
This role reports to	SVP_Sales & Marketing	Role Name as displayed on reports	
Modified By	Nair Arjun Murlidharan, 9/3/2025, 5:55 AM	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		

Users in Purchasing Manager Role

Assign Users to Role | New User

Users in Purchasing Manager Role Help ?

No records to display

Permission Sets:- We created Permission set for the Medical Inventory

The screenshot shows the Salesforce Setup interface. In the left sidebar, under 'Users', 'Permission Sets' is selected. The main area displays a 'Permission Set Overview' for a newly created permission set named 'Purchase Manager Create Access'. The overview includes fields for API Name (Purchase_Manager), Namespace Prefix, Created By (Nair Arjun Murlidharan, 9/3/2025, 6:03 AM), and Last Modified By (Nair Arjun Murlidharan, 9/3/2025, 6:10 AM). Below the overview, there is a section titled 'Apps' which lists various app-related settings.

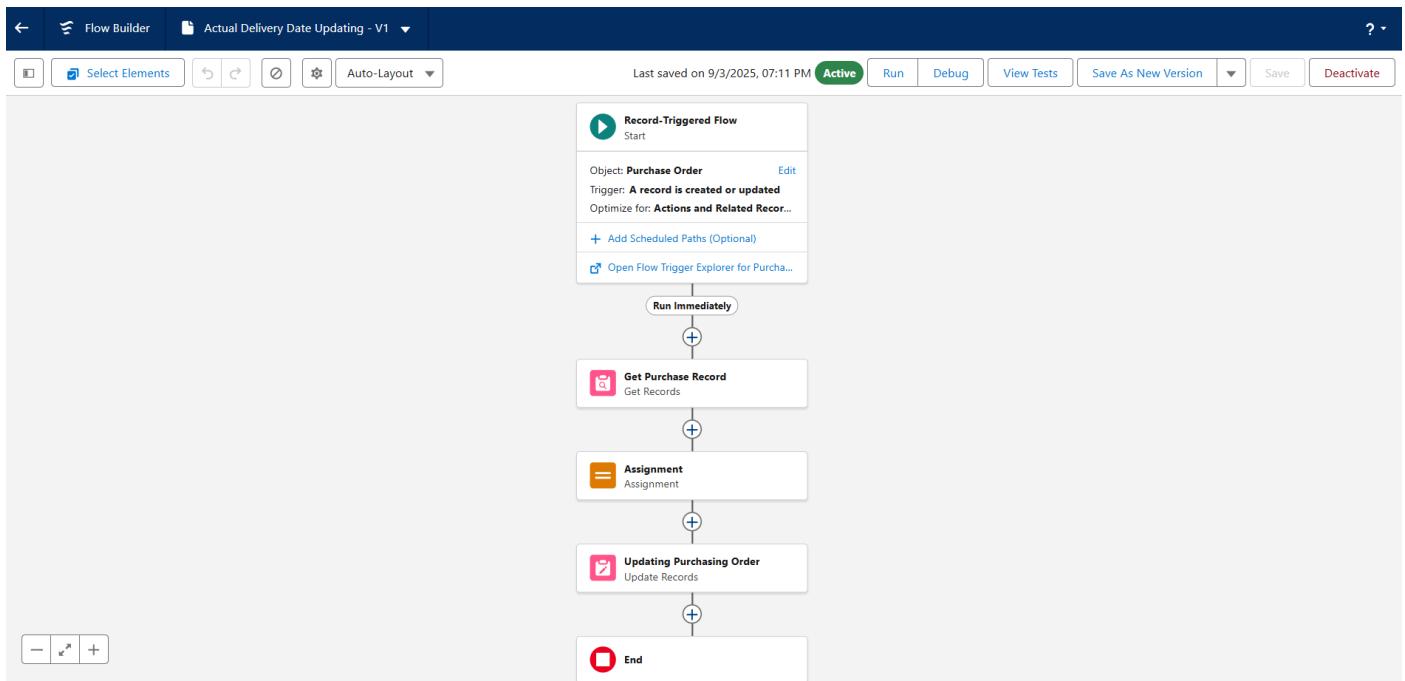
Description	API Name	Namespace Prefix
License	Purchase_Manager	
Session Activation Required		
Permission Set Groups Added To	0	

API Name: Purchase_Manager
Namespace Prefix:
Created By: Nair Arjun Murlidharan, 9/3/2025, 6:03 AM
Last Modified By: Nair Arjun Murlidharan, 9/3/2025, 6:10 AM

Apps

- Assigned Apps**
Settings that specify which apps are visible in the app menu
- Assigned Connected Apps**
Settings that specify which connected apps are visible in the app menu
- Object Settings**
Permissions to access objects and fields, and settings such as tab availability
- App Permissions**
Permissions to perform app-specific actions, such as "Manage Call Centers"
- Apex Class Access**
Permissions to execute Apex classes
- Visualforce Page Access**
Permissions to execute Visualforce pages
- External Data Source Access**

Flows:-We created flow named Actual Delivery Date Update to update the actual delivery date.



Apex Triggers:- We created the trigger to calculate the Total amount on Order item.

Setup Home Object Manager

Apex Triggers

CalculateTotalAmountTrigger

Apex Trigger Detail

Name	CalculateTotalAmountTrigger	sObject Type	Order Item
Code Coverage	0% (0/1)	Status	Active
Created By	Nair Arjun Murlidharan, 9/11/2025, 6:01 AM	Last Modified By	Nair Arjun Murlidharan, 9/11/2025, 6:01 AM
Namespace Prefix			

Apex Trigger Version Settings Trace Flags

```

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

```

Apex Classes:- We created Apex Handler class.

The screenshot shows the Salesforce Setup interface under the Apex Classes section. The class CalculateTotalAmountHandler is selected. The page displays the class detail, including its name, namespace prefix, status, and last modified by. Below the detail is the class body containing the following Apex code:

```

1 public class CalculateTotalAmountHandler {
2
3
4
5     // Method to calculate the total amount for Purchase Orders based on related Order Items
6
7     public static void calculateTotal(List<Order_Item__c> newItems, List<Order_Item__c> oldItems, Boolean isInsert, Boolean isUpdate, Boolean isDelete, Boolean isUndelete) {
8
9
10        // Collect Purchase Order IDs affected by changes in Order_Item__c records
11        Set<Id> parentIdSet = new Set<Id>();
12
13        // For insert, update, and undelete scenarios
14        if (isInsert || isUpdate || isUndelete) {
15            for (Order_Item__c newItem : newItems) {
16                parentIdSet.add(newItem.Parent_Order__c);
17
18                if (isInsert || isUpdate) {
19                    for (Order_Item__c oldItem : oldItems) {
20                        if (oldItem.Id == newItem.Id) {
21                            parentIdSet.add(oldItem.Parent_Order__c);
22
23                            if (isUpdate || isUndelete) {
24                                parentIdSet.remove(oldItem.Parent_Order__c);
25
26                                if (isUndelete) {
27                                    parentIdSet.add(newItem.Parent_Order__c);
28
29                                }
30
31                            }
32
33                        }
34
35                    }
36
37                }
38
39            }
40
41        }
42
43        // Calculate the total amount for each parent purchase order
44        for (Id parentId : parentIdSet) {
45            Purchase_Order__c parentOrder = [SELECT Id, Name, Total_Amount__c FROM Purchase_Order__c WHERE Id = :parentId];
46
47            parentOrder.Total_Amount__c = calculateTotalForParent(parentOrder, newItems, oldItems, isInsert, isUpdate, isDelete, isUndelete);
48
49            update parentOrder;
50
51        }
52
53    }
54
55    private Double calculateTotalForParent(Purchase_Order__c parentOrder, List<Order_Item__c> newItems, List<Order_Item__c> oldItems, Boolean isInsert, Boolean isUpdate, Boolean isDelete, Boolean isUndelete) {
56
57        Double totalAmount = parentOrder.Total_Amount__c;
58
59        for (Order_Item__c newItem : newItems) {
60            if (newItem.Parent_Order__c == parentOrder.Id) {
61                totalAmount += newItem.Unit_Price__c * newItem.Quantity__c;
62
63                if (isInsert || isUpdate) {
64                    for (Order_Item__c oldItem : oldItems) {
65                        if (oldItem.Id == newItem.Id) {
66                            totalAmount -= oldItem.Unit_Price__c * oldItem.Quantity__c;
67
68                            if (isUpdate || isUndelete) {
69                                totalAmount += newItem.Unit_Price__c * newItem.Quantity__c;
70
71                            }
72
73                        }
74
75                    }
76
77                }
78
79            }
80
81        }
82
83        return totalAmount;
84
85    }
86
87}

```

Reports:- Creating Reports named Purchase Orders Click Start report and Complete Purchase Details Report.

The screenshot shows the Medical Inventory ... report page with the title "Report: Purchase Orders with Order Items and Product ID Complete Purchase Details Report". The report table displays the following data:

Total Records	Total Order Count	Total Quantity Received	Total Amount
1	1	50	₹1,000.00
<input type="checkbox"/> Supplier ID ↑ <input type="checkbox"/> Actual Delivery Date ↑ <input type="checkbox"/> Purchase Order: ID ↑ <input type="checkbox"/> Purchase Order: Purchase Order ID <input type="checkbox"/> Order Item: Order Item ID <input type="checkbox"/> Product ID: Product Name <input type="checkbox"/> Product ID: Product ID <input type="checkbox"/> Order Count <input type="checkbox"/> Quantity Received <input type="checkbox"/> Amount			
<input type="checkbox"/> SP002 (1) 9/14/2025 (1) a01gK00000JmmLx (1) P0002 OID002 paracetamol 01lgK00005gxNP 1 50 ₹1,000.00 Subtotal Subtotal Total (1)			

Medical Inventory ... Home Products Purchase Orders Order Items Inventory Transactions Suppliers Reports Dashboards

**Report: Purchase Orders
Purchase Orders based on Suppliers**

Total Records: 2 Total Order Count: 2 Total Total Order Cost: ₹3,200.00

Enable Field Editing

Supplier ID: SP001 (Blue), SP002 (Black)

Sum of Order Count

Supplier ID: Purchase Order: Purchase Order ID: Order Count: Total Order Cost:

SP001 (1)	PO001	1	₹2,200.00
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Dashboards:- We created the Dashboard for the Medical Inventory Management.

Medical Inventory ... Home Products Purchase Orders Order Items Inventory Transactions Suppliers Reports Dashboards

Medical Inventory DashBoard
As of Sep 13, 2025, 8:39 AM Viewing as Nair Arjun Muridharan

Purchase Orders based on Suppliers

Supplier ID	Sum of Order Count
SP001	1
SP002	1

[View Report \(Purchase Orders based on ...\)](#) As of Sep 13, 2025, 8:39 AM

Complete Purchase Details Report

Supplier ID: SP002 (Blue)

[View Report \(Complete Purchase Details ...\)](#) As of Sep 13, 2025, 8:39 AM

3.FUNCTIONAL AND PERFORMANCE TESTING

Performance Testing

Testing the Triggers to get the total amount in the Order Item

The screenshot shows a medical inventory application interface. At the top, there is a navigation bar with links for Home, Products, Purchase Orders, Order Items, Inventory Transactions, Suppliers, Reports, and Dashboards. A search bar is also present. Below the navigation, a specific order item is displayed with the ID OID003. The details include a Purchase Order ID of PO002, an amount of ₹2,500.00, and product information for 'anesthesia'. On the right side, there is an 'Activity' section showing no upcoming or overdue tasks.

Validation Rule checking

The screenshot shows a 'New Purchase Order' dialog box. The 'Information' section contains fields for Purchase Order ID (P002), Supplier ID (SP002), Order Date (9/14/2025), and Actual Delivery Date (9/27/2025). A validation error message is displayed: 'We hit a snag.' with the sub-instruction 'Review the errors on this page.' and the note 'The Expected Delivery Date should not exceed 7 days.' The dialog includes standard buttons for Cancel, Save & New, and Save.

RESULTS:-

Home page

Approvals

Use Approvals to manage approval submissions and approval work items.

Create Flow Approval Process Settings

Manage All Pending Approval Submissions

Manage All Flow Approval Processes

Review My Approval Work Items

Manage My Approval Submissions

Products Page

Products

Recently Viewed

	Product ID	Name	Description	Price	Status
1	P001	Product 1	Description 1	\$100.00	Active
2	P004	Product 4	Description 4	\$200.00	Active
3	P003	Product 3	Description 3	\$150.00	Active
4	P002	Product 2	Description 2	\$120.00	Active

New Import Change Owner Assign Label

Search this list... Filter Sort

Purchase Orders

The screenshot shows the 'Purchase Orders' page. At the top, there's a navigation bar with icons for Home, Products, Purchase Orders (selected), Order Items, Inventory Transactions, Suppliers, Reports, and Dashboards. A search bar is at the top right. Below the navigation is a header with 'Purchase Orders' and 'Recently Viewed' dropdowns, along with buttons for New, Import, Change Owner, and Assign Label. A sub-header indicates '2 items • Updated a few seconds ago'. The main area lists purchase orders with columns for 'Purchase Order ID' and other details. Row 1 shows PO002, and Row 2 shows PO001. A blue box highlights the 'PO002' entry.

	Purchase Order ID
1	PO002
2	PO001

Order items

The screenshot shows the 'Order Items' page. The navigation bar is identical to the Purchase Orders page. The main area lists order items with columns for 'Order Item ID' and other details. Row 1 shows OID003, Row 2 shows OID002, and Row 3 shows OID001. A blue box highlights the 'OID003' entry.

	Order Item ID
1	OID003
2	OID002
3	OID001

https://orgfarm-f851a23diaa-dev-ed.develop.lightning.force.com/lightning/o/Order_Item__c/home

Inventory Transactions

The screenshot shows the 'Inventory Transactions' screen. At the top, there is a navigation bar with links for Home, Products, Purchase Orders, Order Items, Inventory Transactions (which is the active tab), Suppliers, Reports, and Dashboards. A search bar labeled 'Search...' is located at the top right. Below the navigation bar is a header with a bell icon, a star icon, and other system icons. The main content area has a title 'Inventory Transactions' with a 'Recently Viewed' dropdown. It displays a message '1 item • Updated a few seconds ago'. A table lists one item: 'TN001'. The table includes columns for Transaction ID and a checkbox. At the bottom right of the table are edit and delete icons.

Suppliers

The screenshot shows the 'Suppliers' screen. At the top, there is a navigation bar with links for Home, Products, Purchase Orders, Order Items, Inventory Transactions, Suppliers (which is the active tab), Reports, and Dashboards. A search bar labeled 'Search...' is located at the top right. Below the navigation bar is a header with a bell icon, a star icon, and other system icons. The main content area has a title 'Suppliers' with a 'Recently Viewed' dropdown. It displays a message '2 items • Updated a few seconds ago'. A table lists two items: 'SP001' and 'SP002'. The table includes columns for Supplier ID and a checkbox. The row for 'SP001' is currently selected, indicated by a blue border around the entire row. At the bottom right of the table are edit and delete icons.

Reports

The screenshot shows the 'Reports' section of a web application. At the top, there's a search bar with placeholder text 'Search...'. Below it is a navigation bar with links: Home, Products, Purchase Orders, Order Items, Inventory Transactions, Suppliers, Reports (which is currently selected), and Dashboards. On the far right of the navigation bar are icons for star, plus, cloud, question mark, gear, bell, and a user profile.

The main area has a sidebar on the left with categories: Reports, Recent (2 items), Reports (Recent), Created by Me, Private Reports, Public Reports, All Reports, Folders, All Folders, Created by Me, Shared with Me, Favorites, and All Favorites. The 'Recent' section contains two items:

Report Name	Description	Folder	Created By	Created On	Subscribed
Purchase Orders based on Suppliers	Private Reports	Nair Arjun Murlidharan	9/3/2025, 7:37 AM	<input checked="" type="checkbox"/>	
Complete Purchase Details Report	Private Reports	Nair Arjun Murlidharan	9/3/2025, 7:46 AM	<input checked="" type="checkbox"/>	

Dashboards

The screenshot shows the 'Dashboards' section of the application. The layout is similar to the Reports page, with a search bar at the top and a navigation bar below it. The 'Dashboards' link in the navigation bar is also selected.

The sidebar on the left includes: Dashboards, Recent (1 item), Dashboards (Recent), Created by Me, Private Dashboards, All Dashboards, Folders, All Folders, Created by Me, Shared with Me, Favorites, and All Favorites. The 'Recent' section shows one item:

Dashboard Name	Description	Folder	Created By	Created On	Subscribed
Medical Inventory Dashboard	Private Dashboards	Nair Arjun Murlidharan	9/3/2025, 7:50 AM	<input checked="" type="checkbox"/>	

ADVANTAGES AND DISADVANTAGES OF MEDICAL INVENTORY MANAGEMENT:-

ADVANTAGES:-

- 1. Centralized Data** – All medical inventory, supplier, and transaction details are stored in Salesforce, easily accessible from anywhere.
- 2. Real-time Tracking** – Automatic updates to stock after each transaction prevent stockouts and overstocking.
- 3. Expiry & Low Stock Alerts** – Reduces wastage and ensures critical medicines are always available.
- 4. Integration with Accounts** – Suppliers and customers are directly linked, improving accountability.
- 5. Automation** – Formula fields, validation rules, and workflows reduce manual errors.
- 6. Reports & Dashboards** – Provides clear insights into sales, purchases, and inventory status for better decision-making.
- 7. Scalability** – Easily extendable to include new medicines, suppliers, or advanced automation.
- 8. Cloud-based** – No hardware dependency, accessible anytime with Salesforce security features.

DISADVANTAGES:-

- 1. Initial Setup Complexity** – Customizing Salesforce objects, fields, and automation requires technical knowledge
- 2. Dependency on Internet** – As Salesforce is cloud-based, it needs a reliable internet connection.
- 3. Cost Factor** – Salesforce licensing and storage may be expensive for small clinics or pharmacies.

- 4. Learning Curve** – Users need training to effectively use reports, dashboards, and automation.
- 5. Customization Limits** – Some advanced features may require Apex coding or third-party apps.

CONCLUSION

The Salesforce-based Medical Inventory Management System successfully demonstrates how CRM platforms can be customized beyond customer management to serve as a complete healthcare inventory solution. By integrating medicine management, transactions, suppliers, customers, and dashboards, the system ensures accuracy, efficiency, and reliability in handling medical stock. Despite minor challenges such as cost and setup complexity, the system provides long-term benefits including real-time monitoring, reduced wastage, improved supplier relations, and data-driven insights. Overall, this project proves the effectiveness of Salesforce as a scalable platform for building critical inventory solutions in the medical domain.