PROJECT TITLE

MEDICAL INVENTORY MANAGEMENT

COLLEGE NAME : HINDUSTHAN COLLEGE OF SCIENCE AND COMMERCE

INGUR,PERUNDURAI.

COLLEGE CODE:

TEAM ID: NM2025TMID28255

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1.INTRODUCATION

1.1 Project Overview

Medical inventory management is the specialized process of systematically controlling, tracking, and managing medical supplies, equipment, and pharmaceuticals within healthcare settings to ensure patient safety, operational continuity, and cost-effectiveness .

Key Objectives and Benefits:

Meeting Customer Demand:

Ensure sufficient stock is available to fulfill customer orders promptly and consistently, which enhances customer satisfaction and brand image.

Minimizing Costs:

Reduce holding costs and the risk of obsolescence by avoiding overstocking, which ties up capital and increases storage expenses.

Preventing Stock outs:

Avoid losing sales and frustrating customers by having enough inventory to meet demand, even fluctuations or disruptions.

Optimizing Operational Efficiency:

Improve the flow of goods and materials, which enables faster shipping, smoother production processes, and more effective overall supply chain management.

Boosting Profitability:

By balancing costs and sales, effective inventory management contributes directly to higher profit margins and a healthier financial position.

-

Informing Decision-Making:

Provide accurate data on stock levels and demand, which supports better forecasting, planning, and strategic business decisions.

Reducing Waste and Loss:
Monitor inventory to minimize spoilage, damage, and theft, thereby reducing overall losses.

Importance Of Medical Clinic Inventory Management

- Patient Safety and Healthcare Quality
- Cost Management
- Operational Efficiency
- Regulatory Compliance
- Expiry Date Alerts
- Data Driven Decision Making
- Emergency Preparedness

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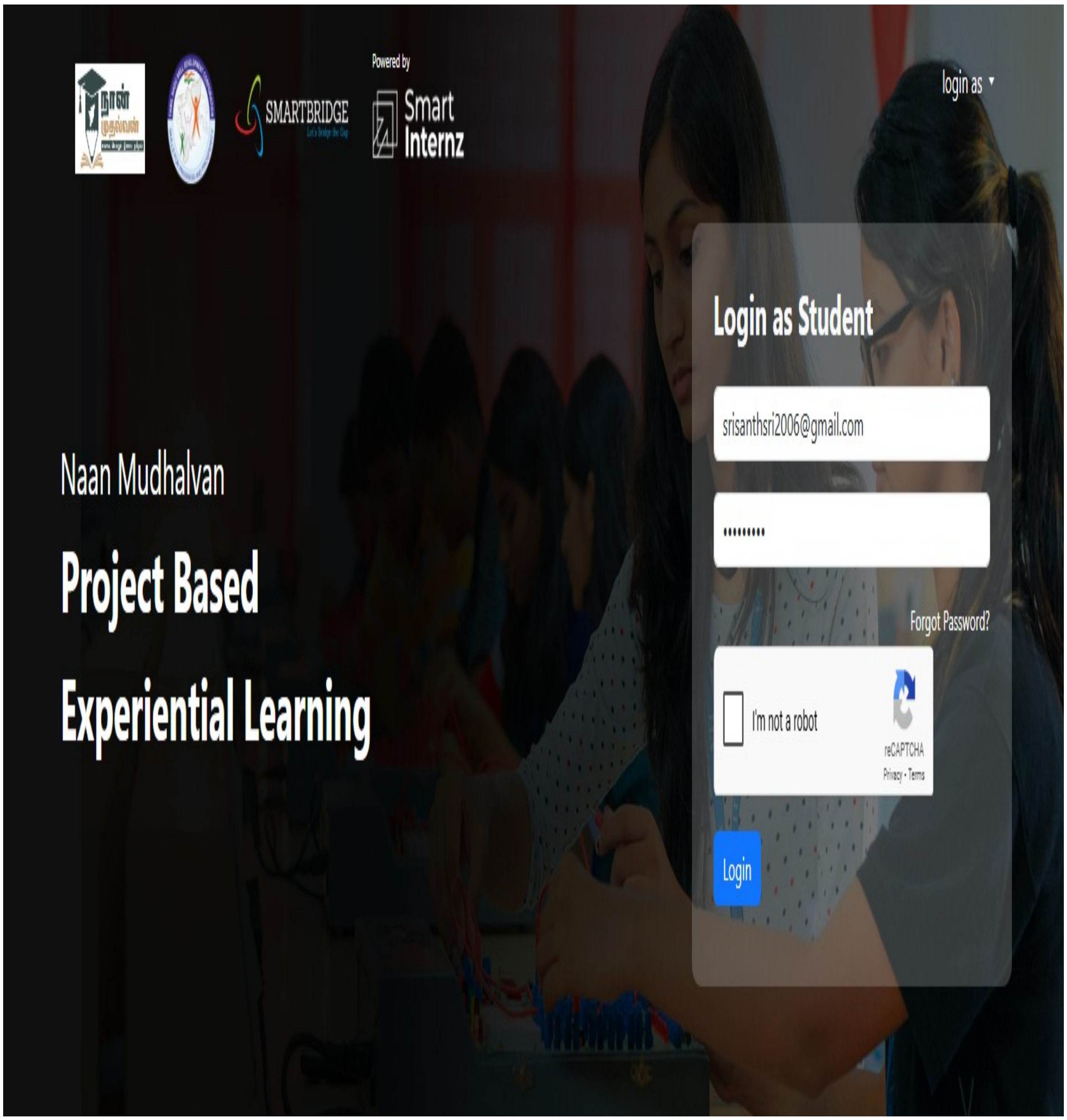
DEVELOPMENT PHASE

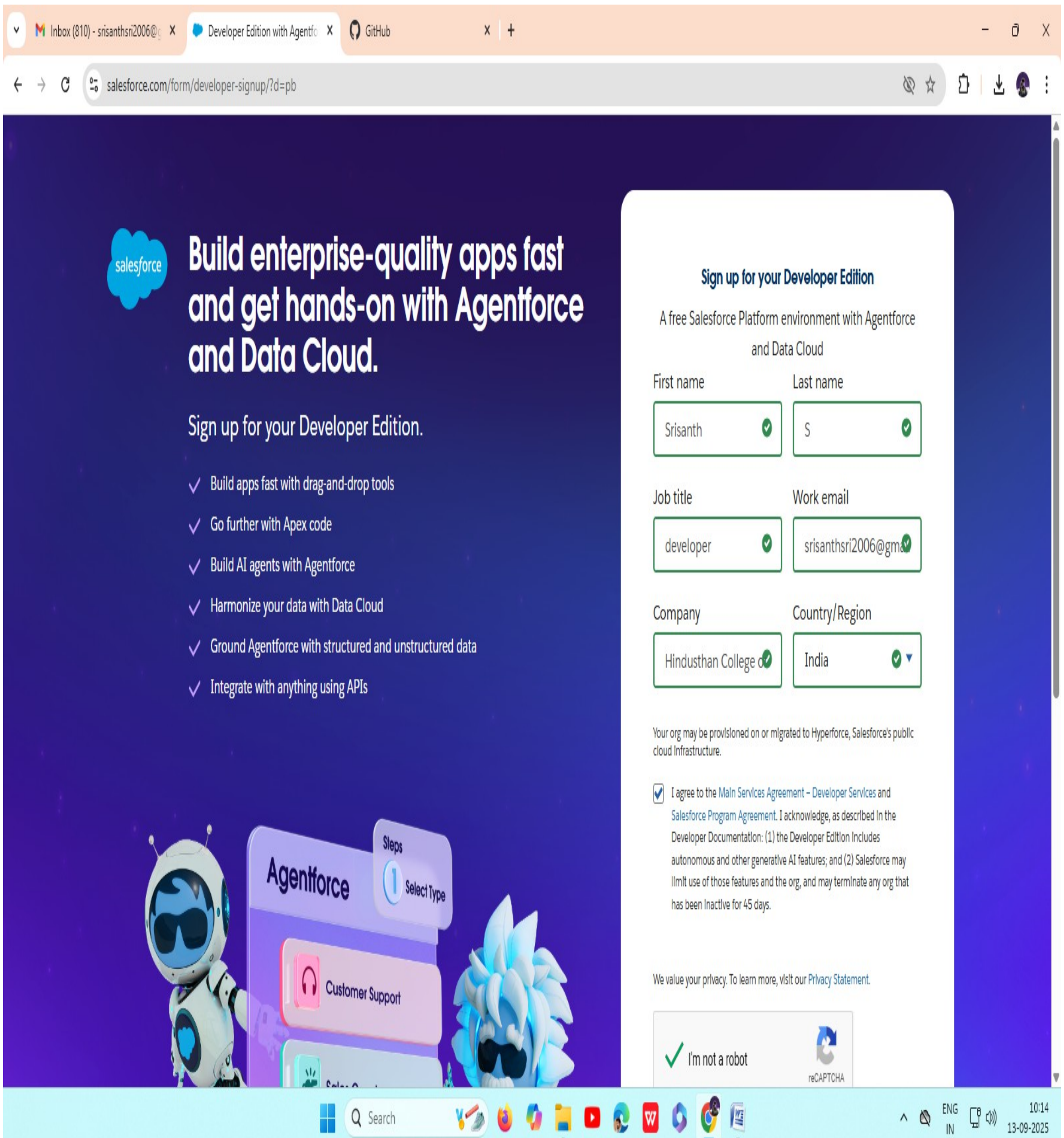
LOGIN AS STUDENT:

By using this URL- https://naanmudhalvan.smartinternz.com

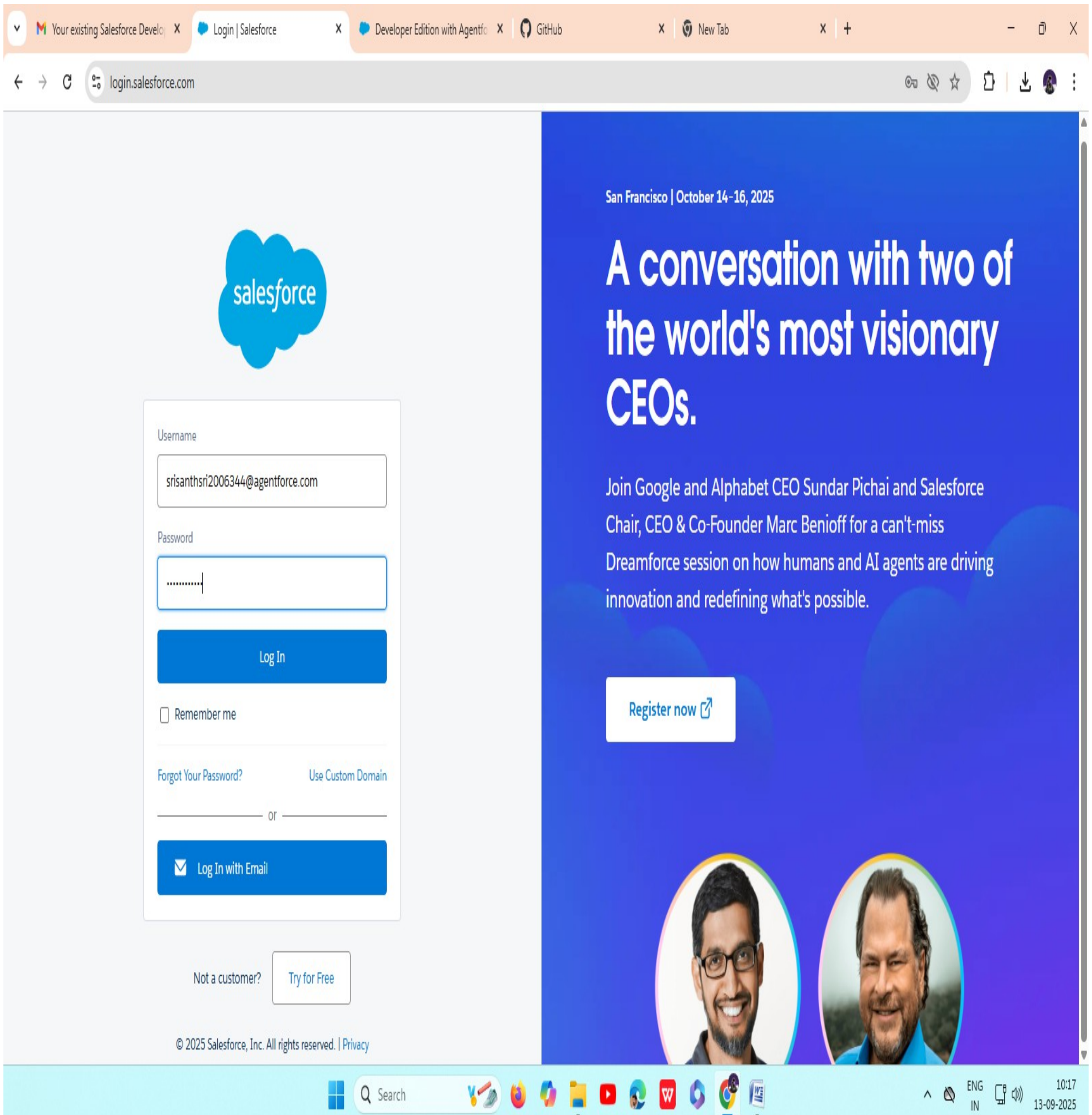


Creating Developer Account:

By using this URL- https://www.salesforce.com/form/developer-signup/?d=pb

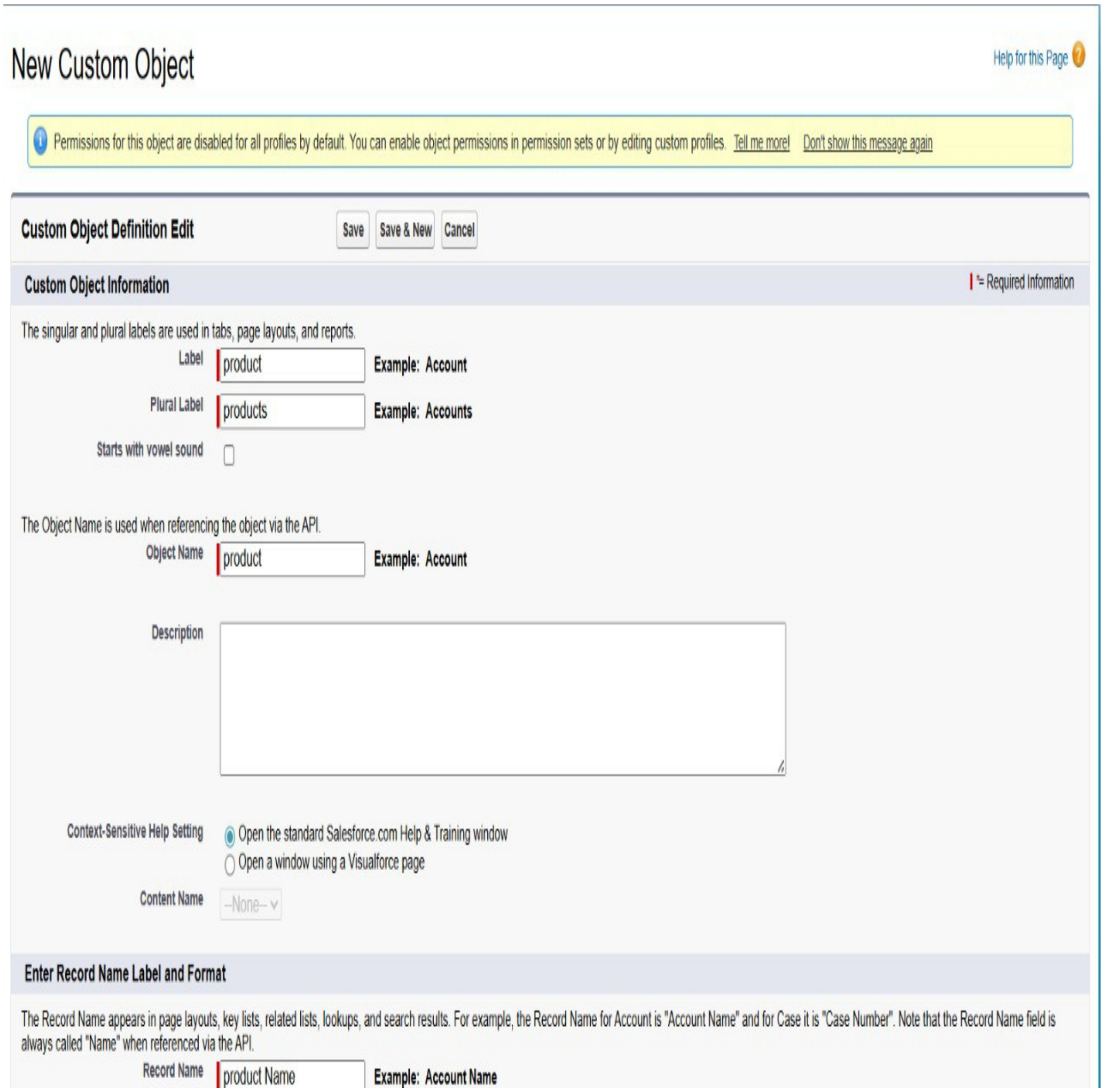


ACCOUNT ACTIVATION:



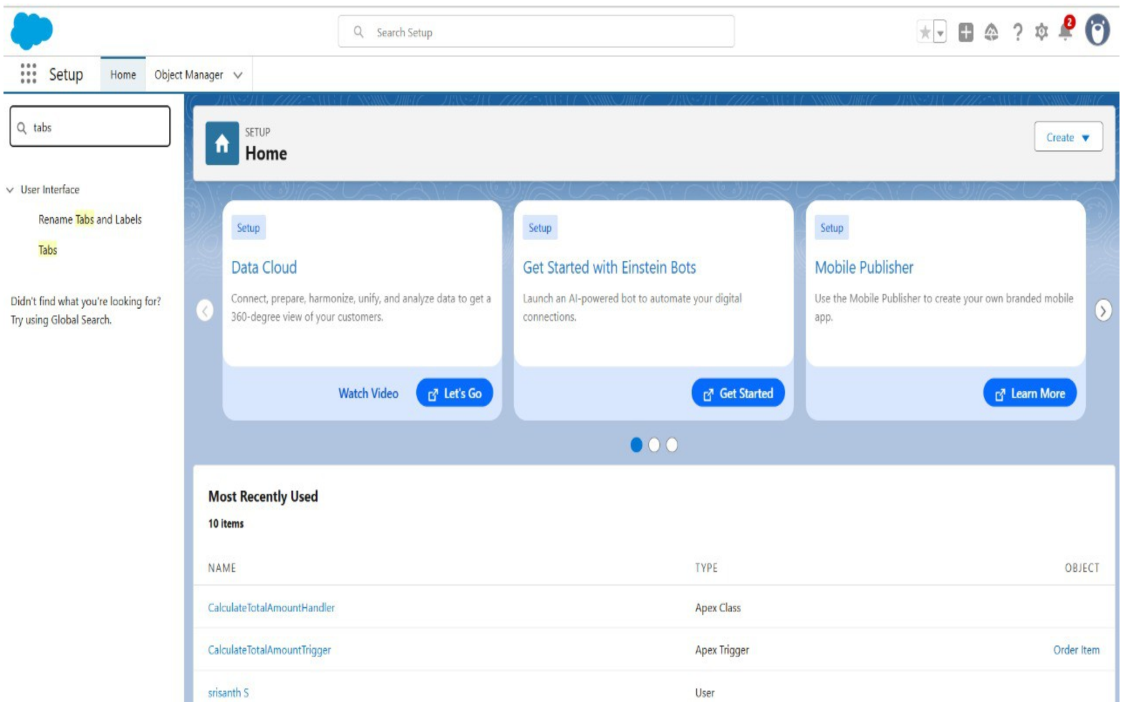
- It will redirect to your salesforce setup page.

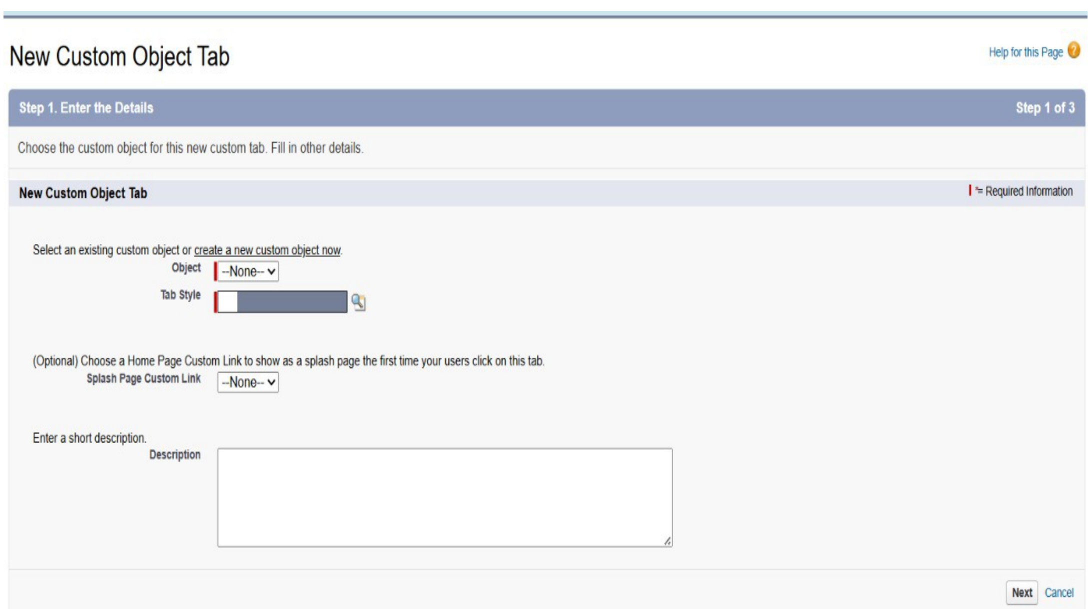
Creating a Product Object :

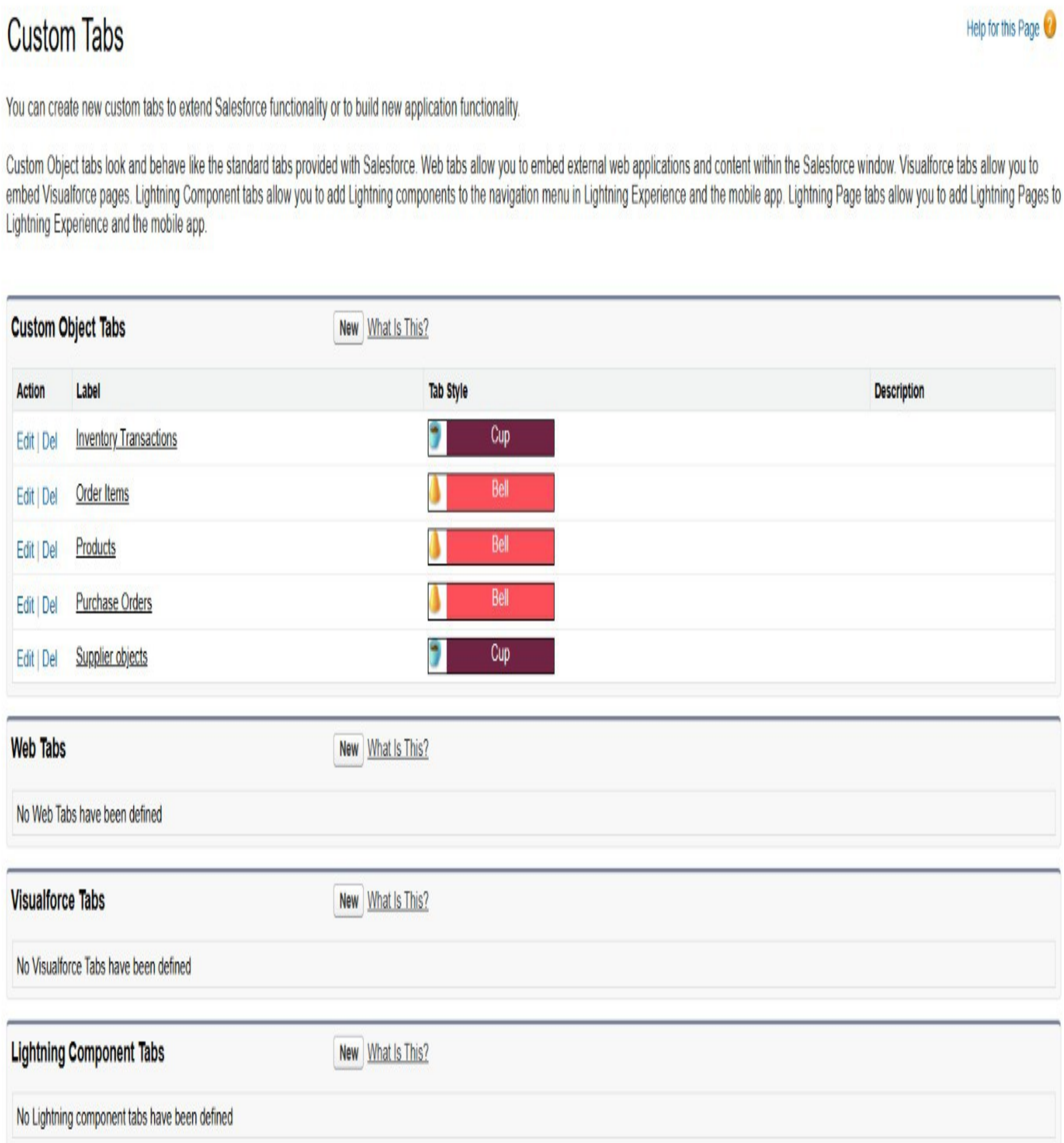


- In the same way Create Purchase Order, Order Item, Inventory Transaction and Supplier objects

Creating a tab for Product Object:

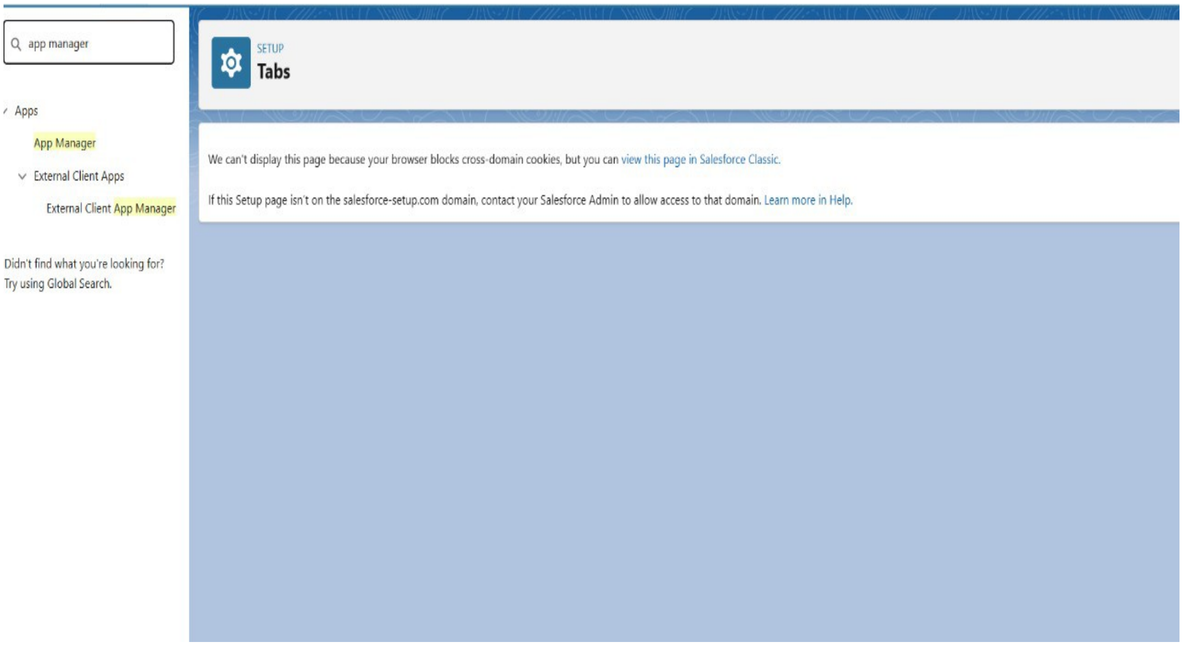


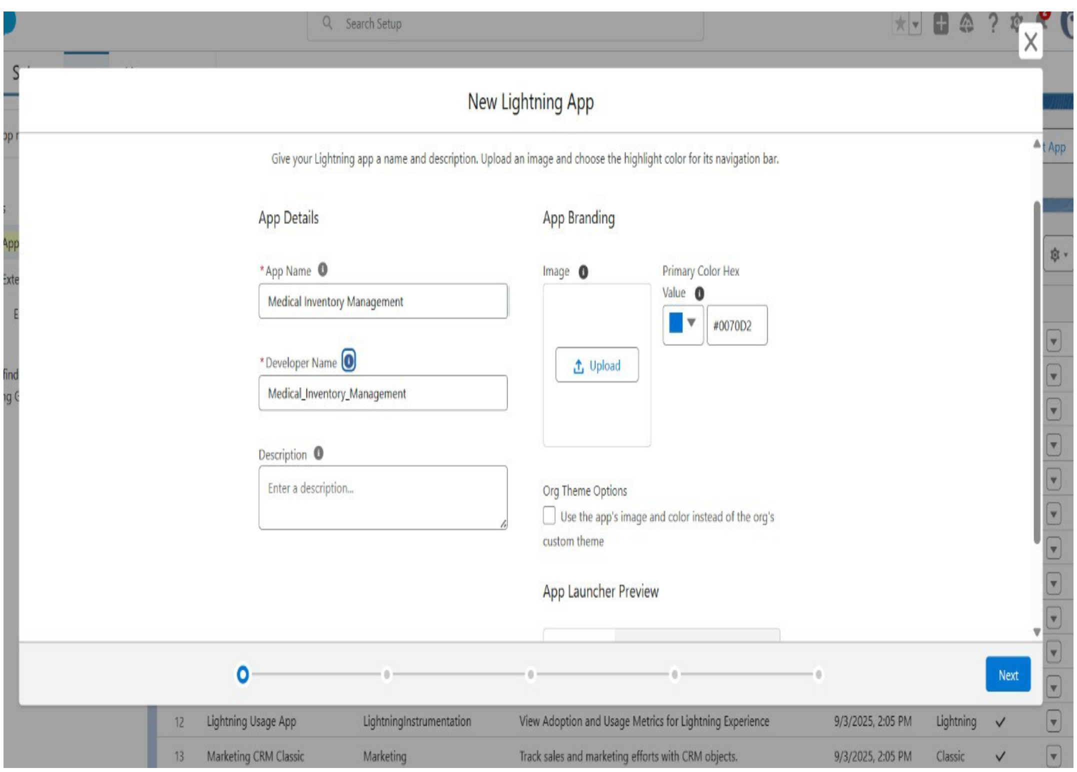


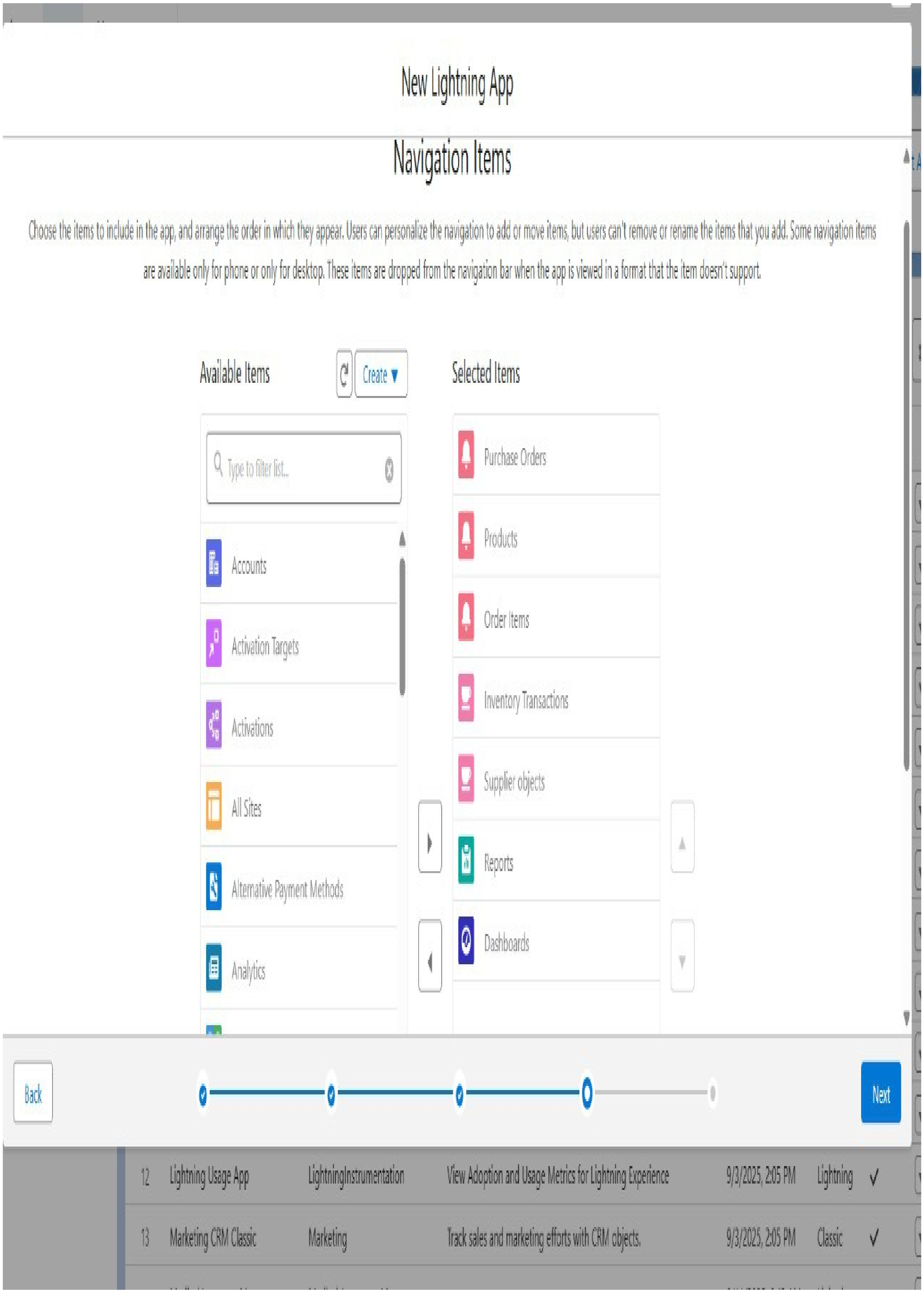


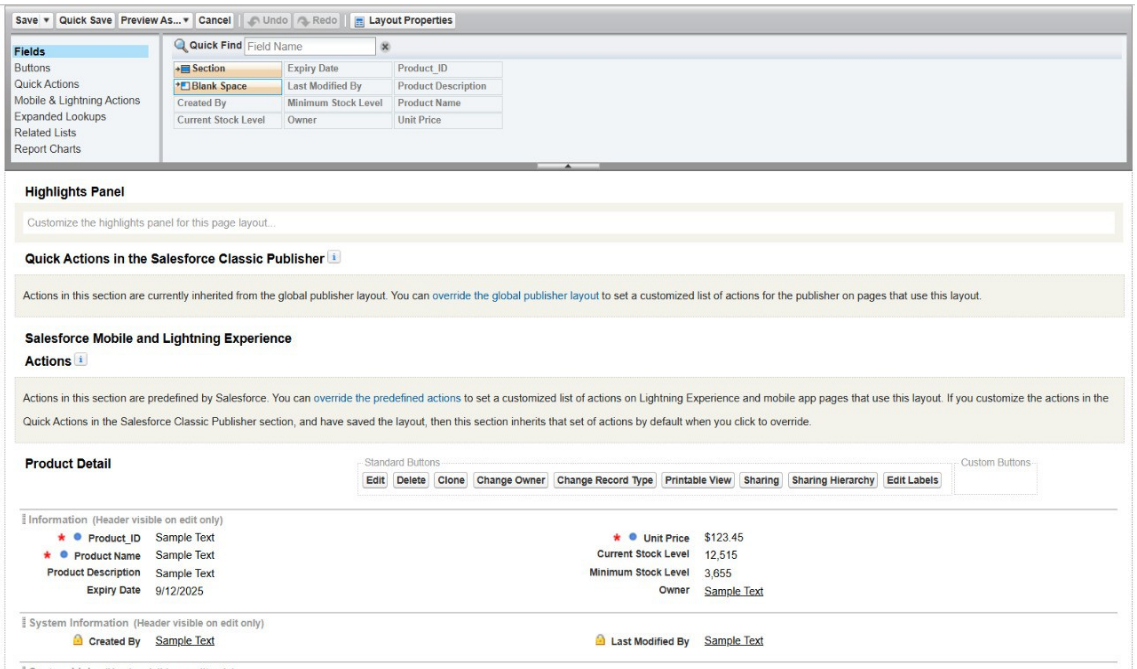
- Follow the same steps for “Purchase Order, Order Item, Inventory Transaction, Supplier”

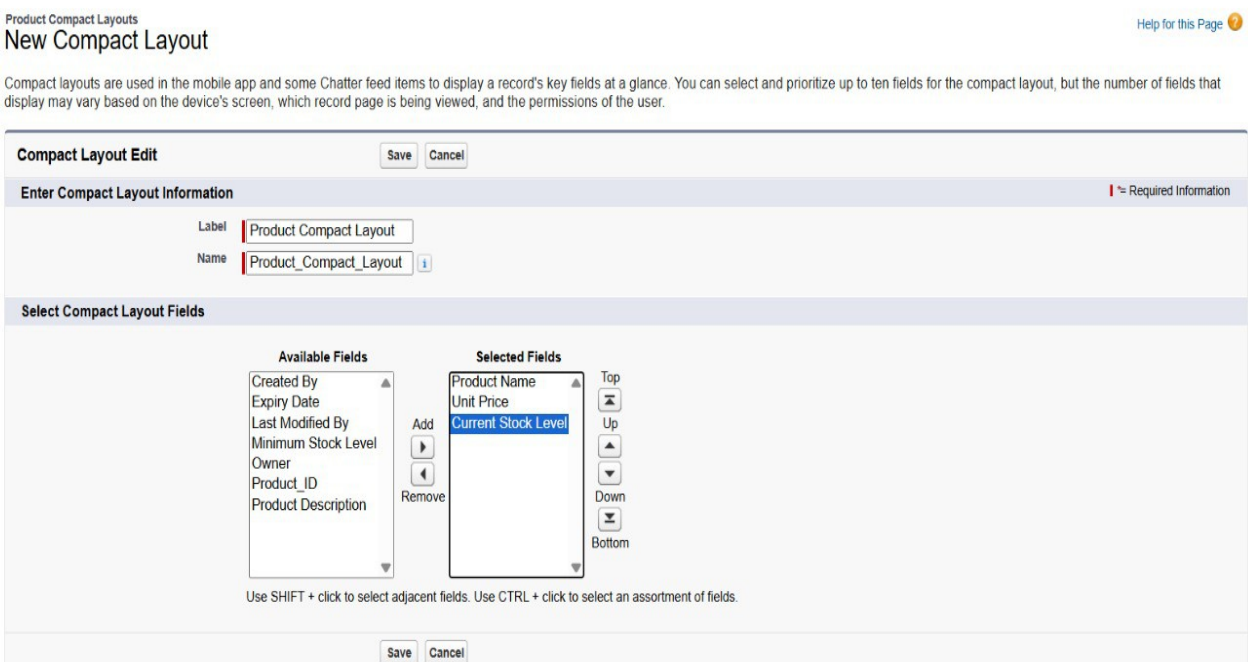
Create a Lightning App :

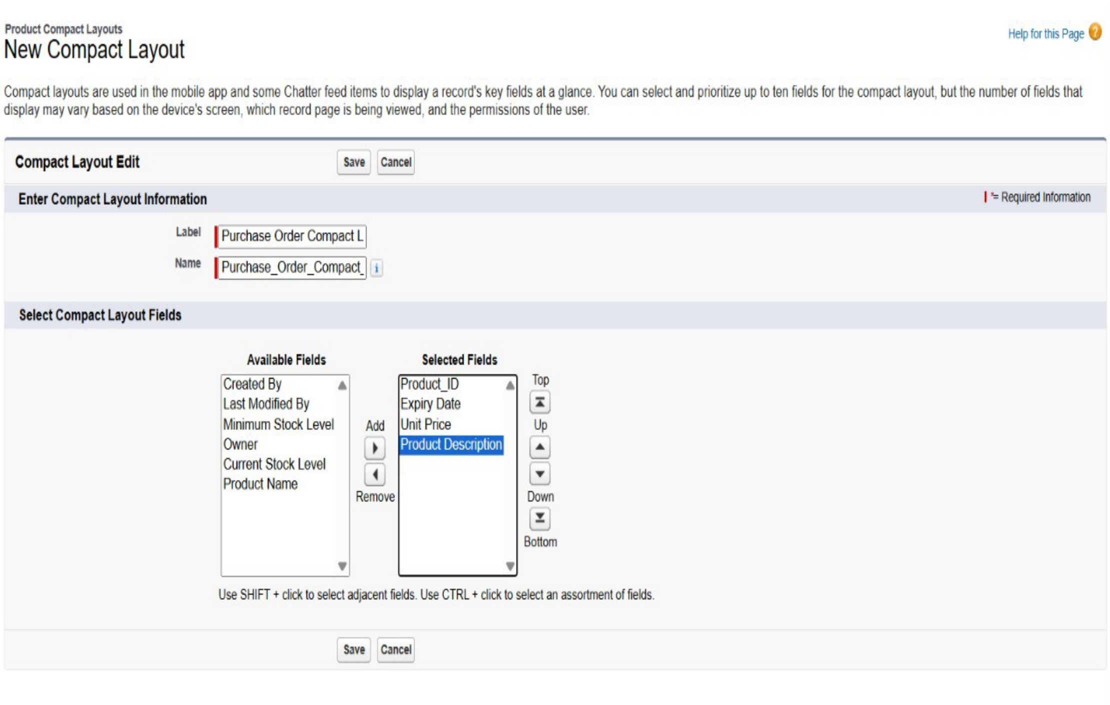





New Lightning App
Navigation Items
Choose the items to include in the app, and arrange the order in which they appear. Users can personalize the navigation to add or move items, but users can't remove or rename the items that you add. Some navigation items are available only for phone or only for desktop. 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
Type to filter list...
Accounts
Activation Targets
Activations
All Sites
Alternative Payment Methods
Analytics
Selected Items
Purchase Orders
Products
Order Items
Inventory Transactions
Supplier objects
Reports
Dashboards
Back
Next
12 Lightning Usage App LightningInstrumentation View Adoption and Usage Metrics for Lightning Experience 9/3/2025, 2:05 PM Lightning
13 Marketing CRM Classic Marketing Track sales and marketing efforts with CRM objects. 9/3/2025, 2:05 PM Classic


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
Blank Space
Created By
Current Stock Level
Expiry Date
Last Modified By
Minimum Stock Level
Owner
Product_ID
Product Description
Product Name
Unit Price
Highlights Panel
Customize the highlights panel for this page layout...
Quick Actions in the Salesforce Classic Publisher
Actions in this section are currently inherited from the global publisher layout. You can override the global publisher layout to set a customized list of actions for the publisher on pages that use this layout.
Salesforce Mobile and Lightning Experience Actions
Actions in this section are predefined by Salesforce. You can override the predefined actions to set a customized list of actions on Lightning Experience and mobile app pages that use this layout. If you customize the actions in the Quick Actions in the Salesforce Classic Publisher section, and have saved the layout, then this section inherits that set of actions by default when you click to override.
Product Detail
Standard Buttons
Edit
Delete
Clone
Change Owner
Change Record Type
Printable View
Sharing
Sharing Hierarchy
Edit Labels
Custom Buttons
Information (Header visible on edit only)
Product_ID Sample Text
Product Name Sample Text
Product Description Sample Text
Expiry Date 9/12/2025
Unit Price $123.45
Current Stock Level 12,515
Minimum Stock Level 3,655
Owner Sample Text
System Information (Header visible on edit only)
Created By Sample Text
Last Modified By Sample Text


Product Compact Layouts
New Compact Layout
Help for this Page
Compact layouts are used in the mobile app and some Chatter feed items to display a record's key fields at a glance. You can select and prioritize up to ten fields for the compact layout, but the number of fields that display may vary based on the device's screen, which record page is being viewed, and the permissions of the user.
Compact Layout Edit
Save
Cancel
Enter Compact Layout Information
= Required Information
Label
Product Compact Layout
Name
Product_Compact_Layout
Select Compact Layout Fields
Available Fields
Created By
Expiry Date
Last Modified By
Minimum Stock Level
Owner
Product_ID
Product Description
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
New Compact Layout
Help for this Page
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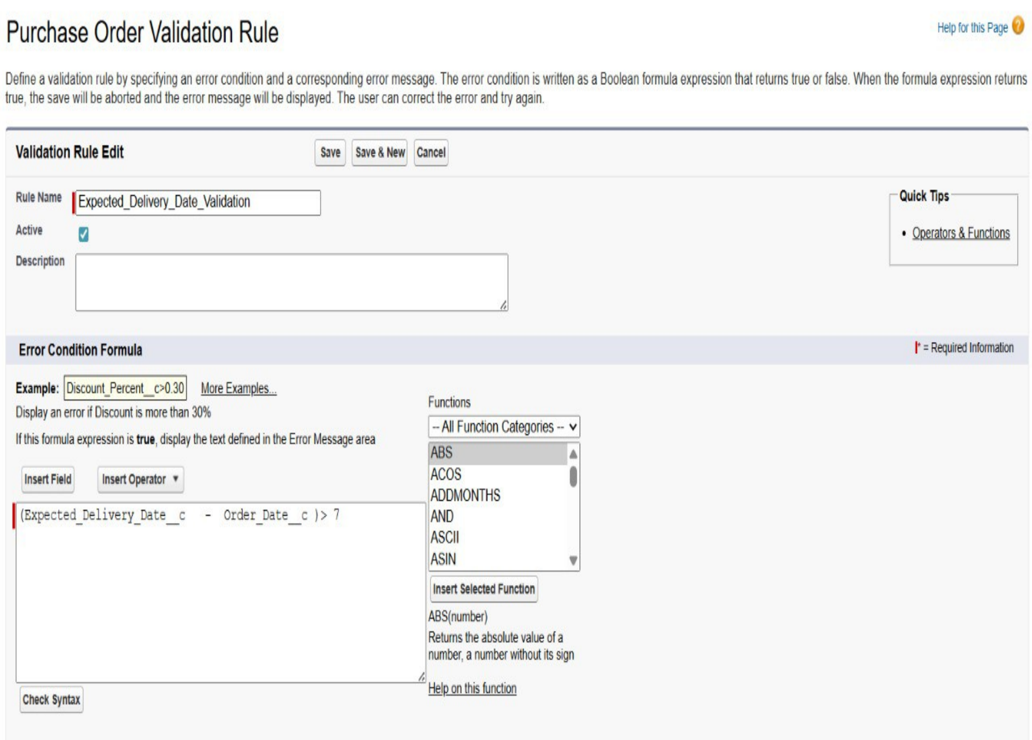
Compact Layout Edit
Save
Cancel
Enter Compact Layout Information
= Required Information
Label
Purchase Order Compact L
Name
Purchase_Order_Compact_
Select Compact Layout Fields
Available Fields
Created By
Last Modified By
Minimum Stock Level
Owner
Current Stock Level
Product Name
Add
Remove
Selected Fields
Product_ID
Expiry Date
Unit Price
Product Description
Top
Up
Down
Bottom
Use SHIFT + click to select adjacent fields. Use CTRL + click to select an assortment of fields.
Save
Cancel


Purchase Order Validation Rule
Help for this Page
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
Active
Description
Quick Tips
Operators & Functions
Error Condition Formula
= Required Information
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
Functions
-- All Function Categories --
ABS
ACOS
ADDMONTHS
AND
ASCII
ASIN
Insert Selected Function
ABS(number)
Returns the absolute value of a number, a number without its sign
Help on this function
Check Syntax

Clone Profile

Help for this Page

Enter the name of the new profile.

You must select an existing profile to clone from. | = Required Information

Existing Profile	Standard User
User License	Salesforce
Profile Name	Inventory Manager

Save Cancel

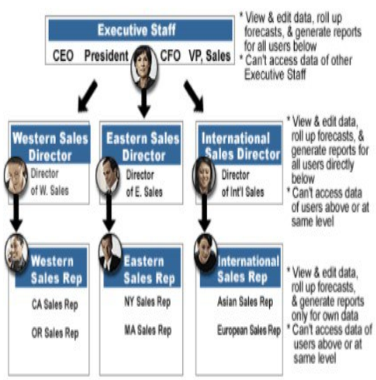
Understanding Roles

Help for this Page

Set up your Role Hierarchy to control how your organization reports on and accesses data.

Sample Role Hierarchy

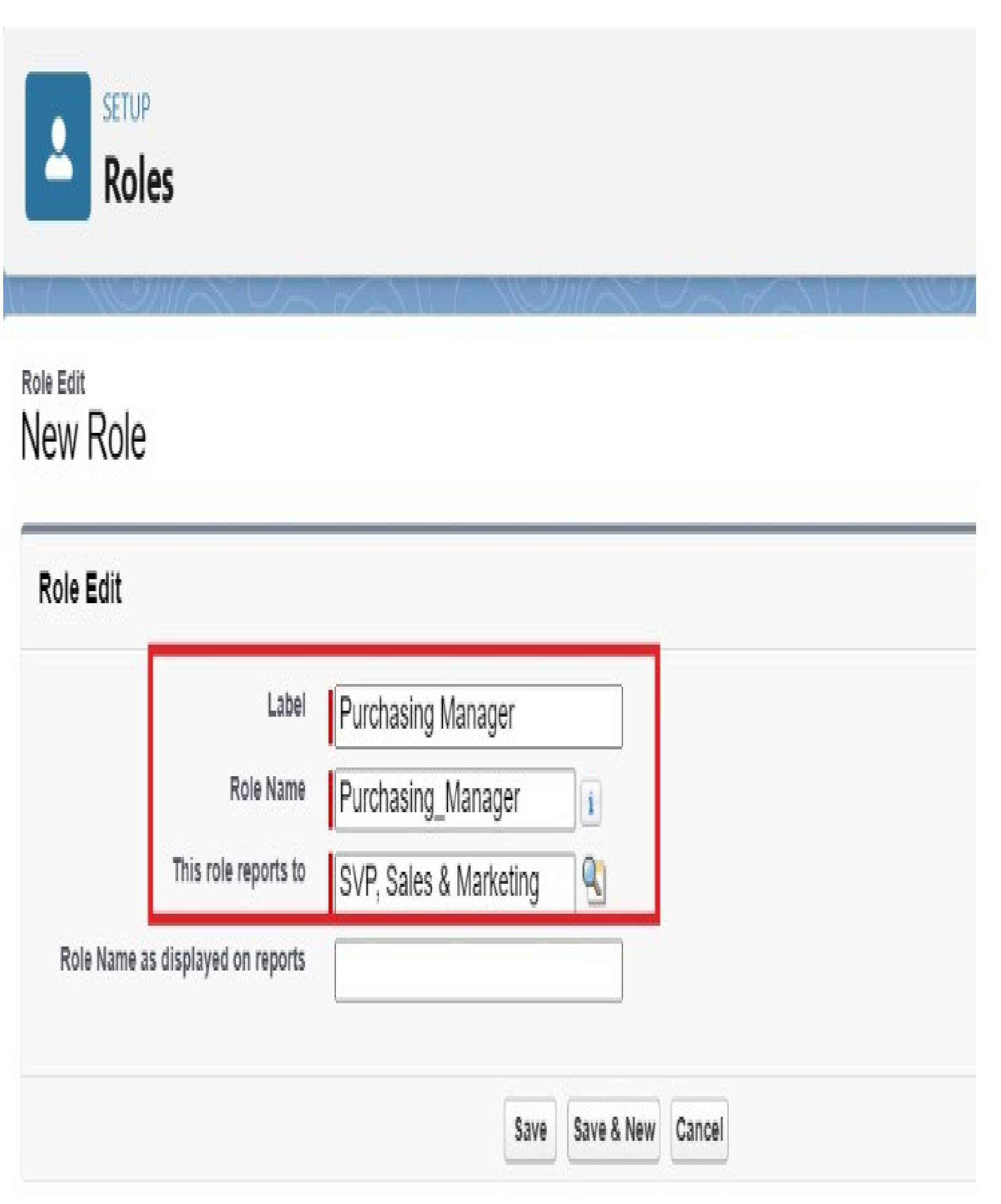
View other sample Role Hierarchies: Territory-based Sample

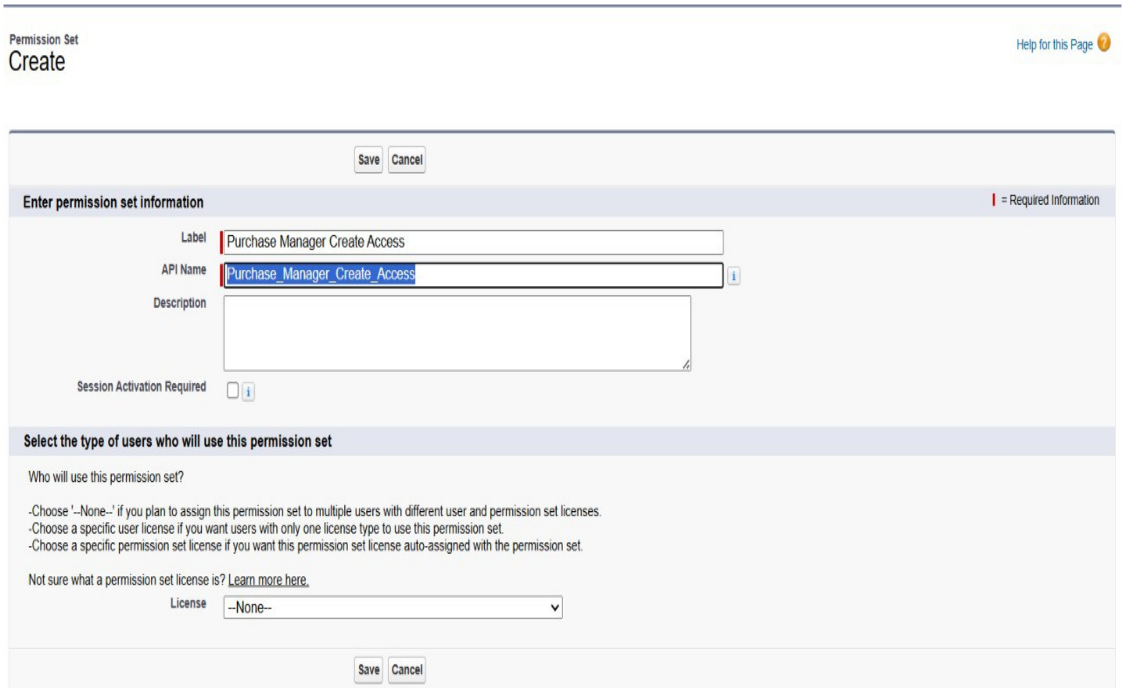


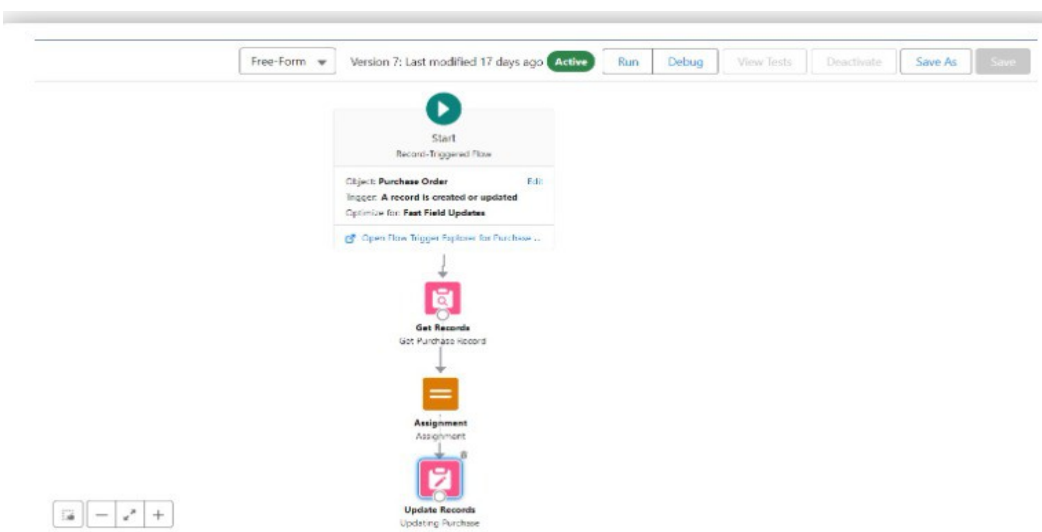
Set Up Roles

Don't show this page again

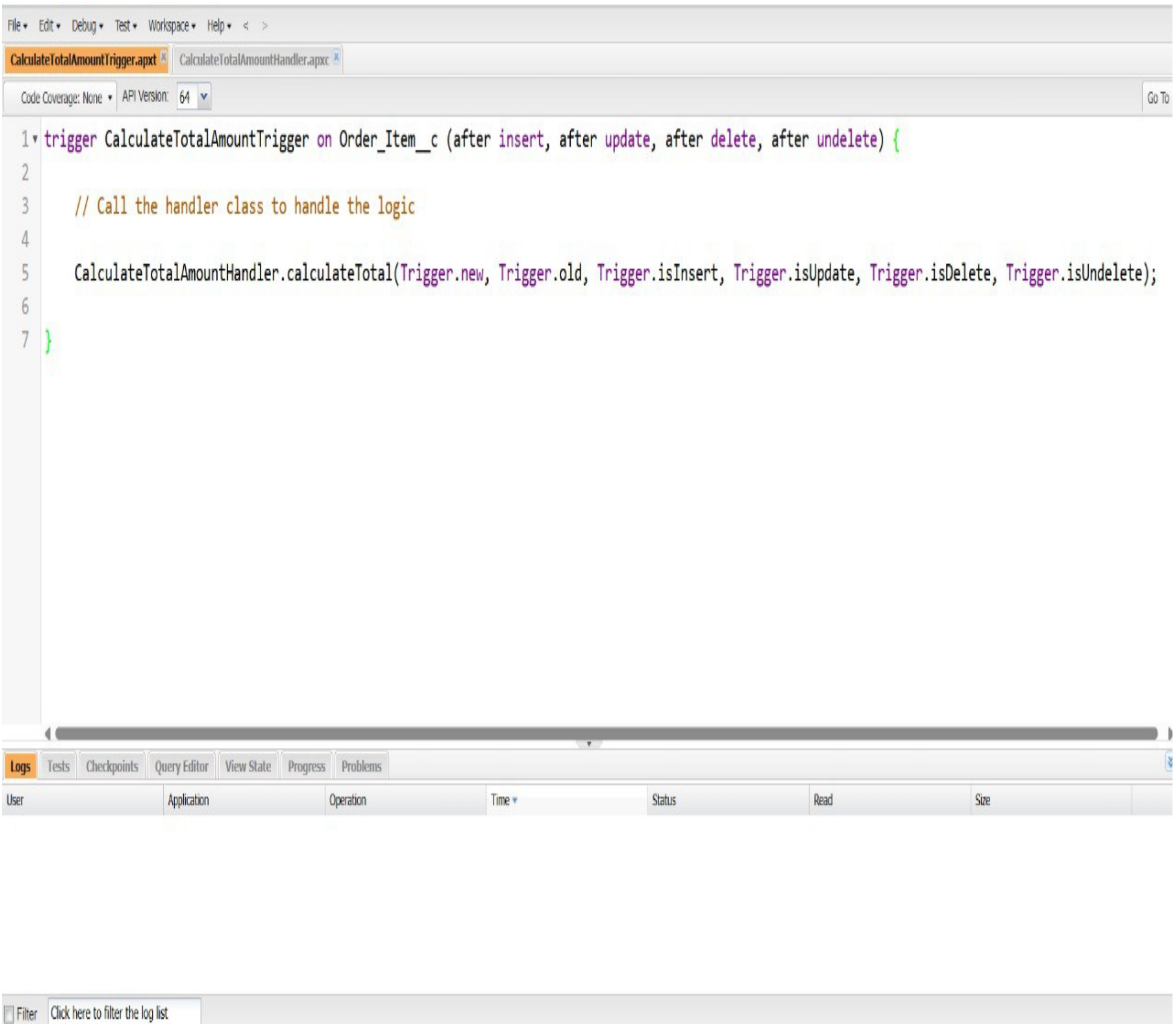
Create a Role:



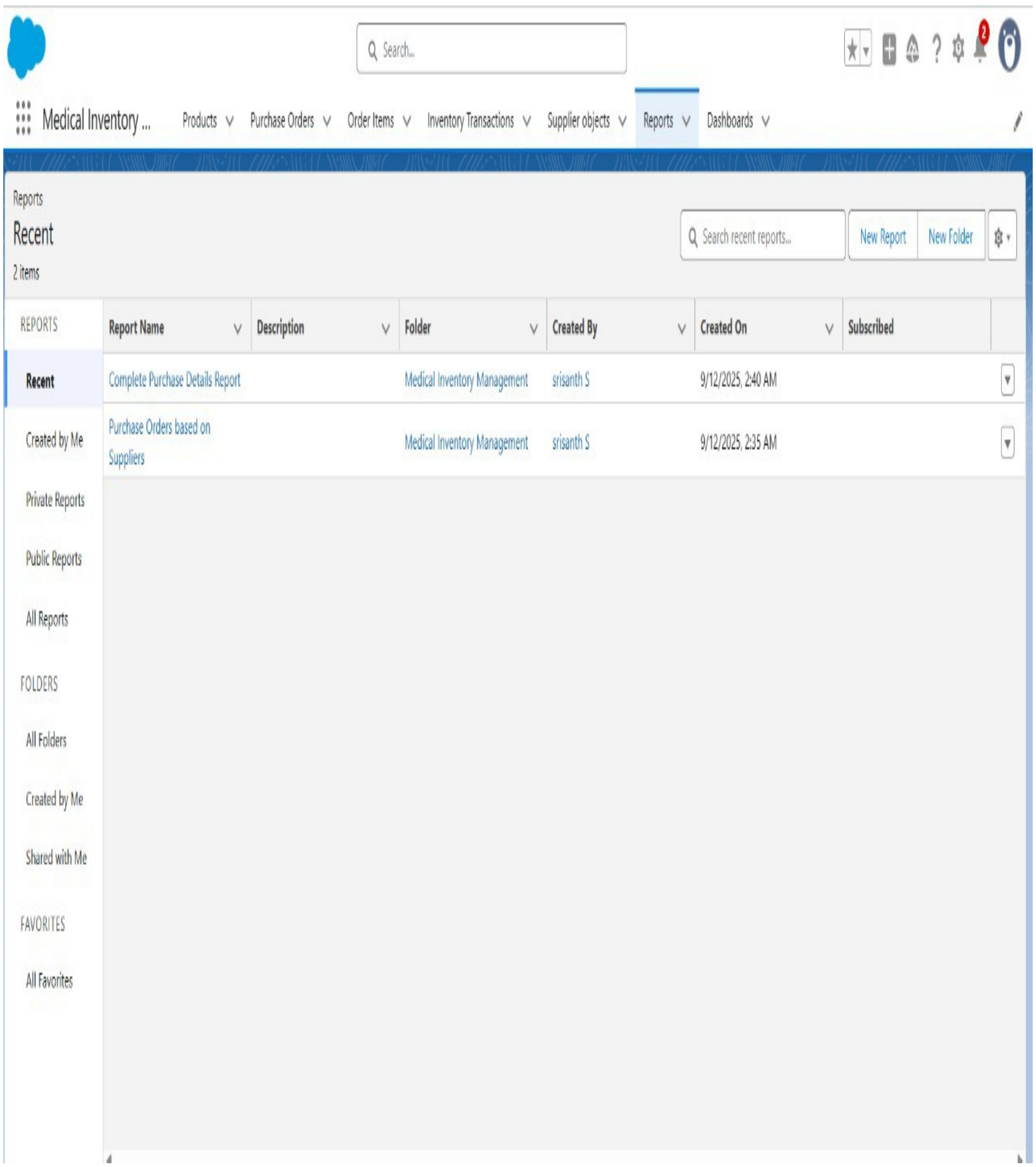

Permission Set
Create
Help for this Page
Save Cancel
Enter permission set information
= Required Information
Label
Purchase Manager Create Access
API Name
Purchase_Manager_Create_Access
Description
Session Activation Required
Select the type of users who will use this permission set
Who will use this permission set?
-Choose '--None--' if you plan to assign this permission set to multiple users with different user and permission set licenses.
-Choose a specific user license if you want users with only one license type to use this permission set.
-Choose a specific permission set license if you want this permission set license auto-assigned with the permission set.
Not sure what a permission set license is? Learn more here.
License
--None--
Save Cancel


Free-Form
Version 7: Last modified 17 days ago
Active
Run
Debug
View Tests
Deactivate
Save As
Save
Start
Record-Triggered Flow
Object: Purchase Order
Edit
Trigger: A record is created or updated
Optimize for: Fast Field Updates
Get Records
Get Purchase Record
Assignment
Assignment
Update Records
Updating Purchase Order

Create a Trigger to Calculate total amount on Order Item :

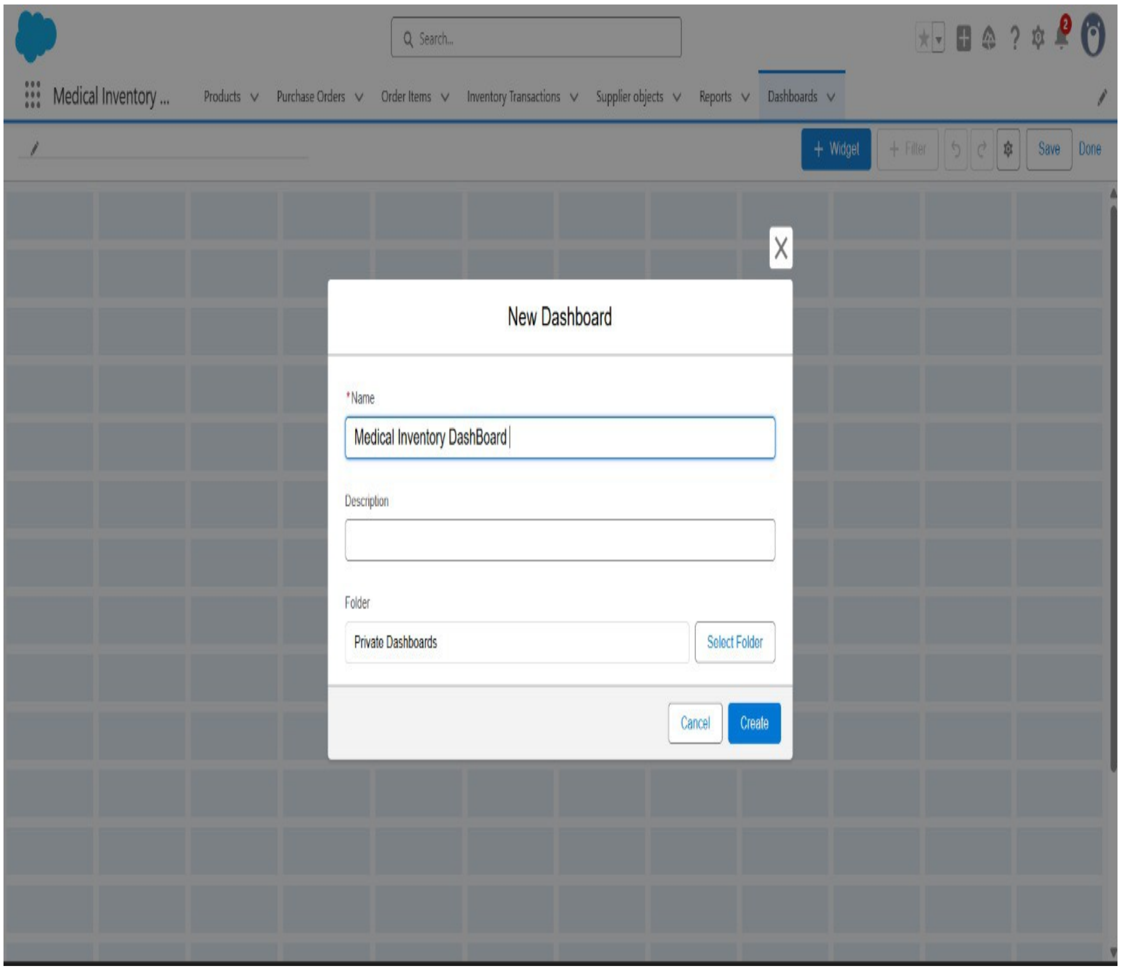


Reports :

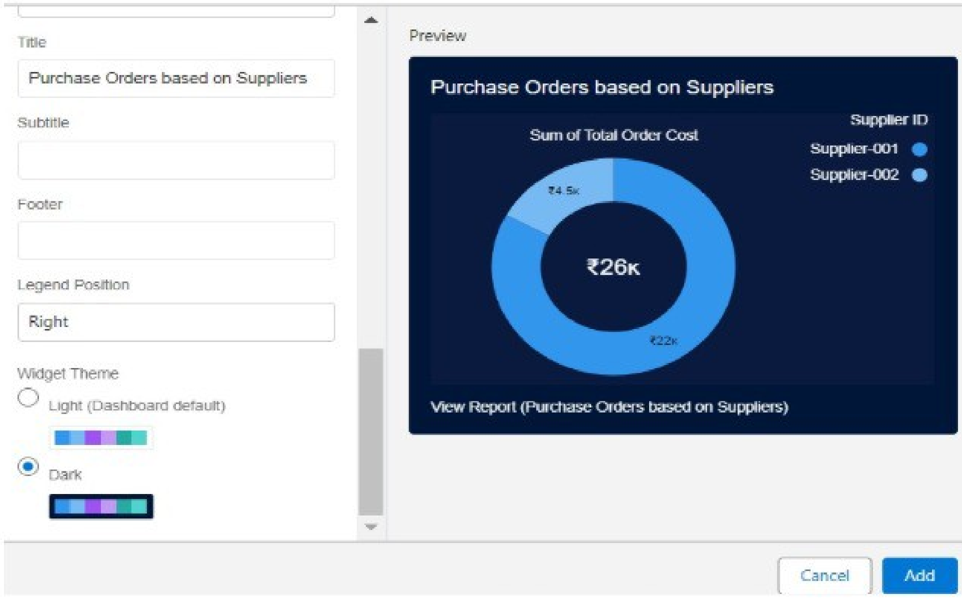


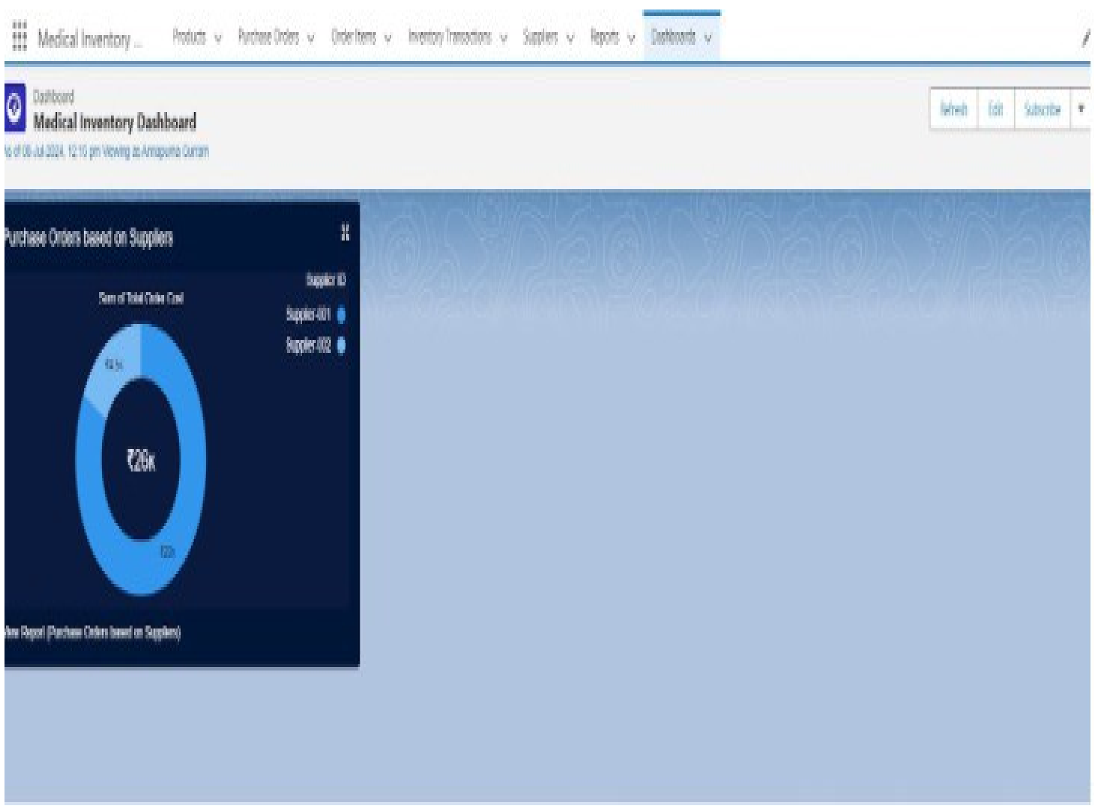
Search...
Medical Inventory ...
Products
Purchase Orders
Order Items
Inventory Transactions
Supplier objects
Reports
Dashboards
Reports
Recent
2 items
Search recent reports...
New Report
New Folder
REPORTS
Recent
Created by Me
Private Reports
Public Reports
All Reports
FOLDERS
All Folders
Created by Me
Shared with Me
FAVORITES
All Favorites
Report Name
Description
Folder
Created By
Created On
Subscribed
Complete Purchase Details Report
Medical Inventory Management
srisanth S
9/12/2025, 2:40 AM
Purchase Orders based on Suppliers
Medical Inventory Management
srisanth S
9/12/2025, 2:35 AM

Dash Boards :



Search...
Medical Inventory ...
Products
Purchase Orders
Order Items
Inventory Transactions
Supplier objects
Reports
Dashboards
+ Widget
+ Filter
Save
Done
New Dashboard
*Name
Medical Inventory DashBoard
Description
Folder
Private Dashboards
Select Folder
Cancel
Create


Title
Purchase Orders based on Suppliers
Subtitle
Footer
Legend Position
Right
Widget Theme
Light (Dashboard default)
Dark
Preview
Purchase Orders based on Suppliers
Supplier ID
Sum of Total Order Cost
Supplier-001
Supplier-002
₹4.5K
₹26K
₹22K
View Report (Purchase Orders based on Suppliers)
Cancel
Add


Medical Inventory
Dashboard
Medical Inventory Dashboard
Purchase Orders based on Suppliers
₹26K