

PROJECT TITLE

MEDICAL INVENTORY MANAGEMENT

COLLEGE NAME : HINDUSTHAN COLLEGE OF SCIENCE AND COMMERCE

INGUR,PERUNDURAI.

COLLEGE CODE:

TEAM ID: NM2025TMID28255

TEAM MEMBERS:

TEAM LEADER NAME: SRISANTH S

EMAIL: srisanthstri2006@gmail.com

TEAM MEMBER 1: DHANUSH M

EMAIL: ghanushds142@gmail.com

TEAM MEMBER 2 : DHANUSH R

EMAIL: ghanush20491@gmail.com

TEAM MEMBER 3: DHANUSH S

EMAIL: ghanushdhanush12950@gmail.com

1.INTRODUCTION

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

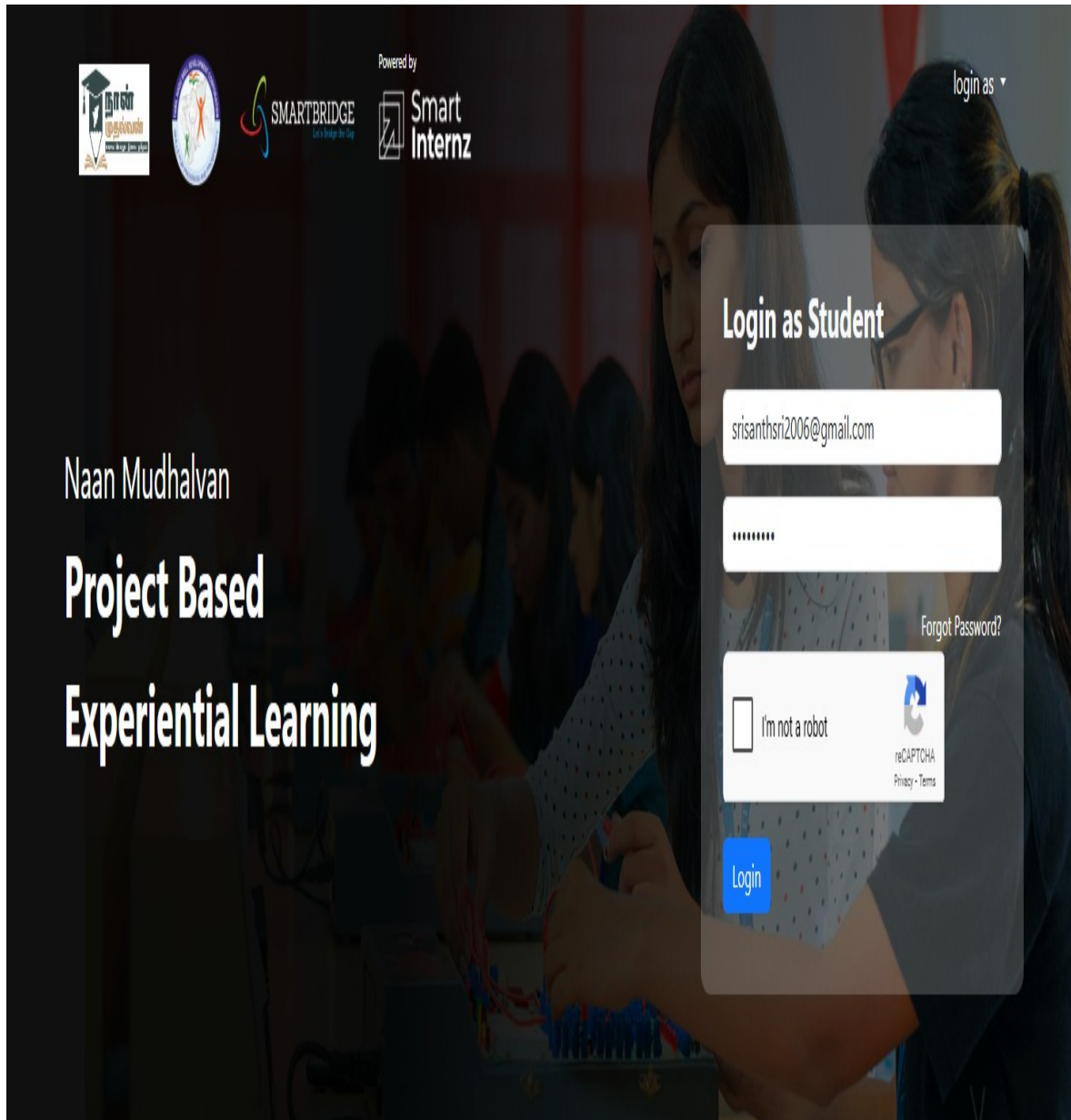


Emergency Preparedness

DEVELOPMENT PHASE

LOGIN AS STUDENT:

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



Naan Mudhalvan
Project Based
Experiential Learning

login as ▾

Powered by

SMARTERIDGE
Let's bridge the gap

Smart
Internz

Login as Student

srisanthsr2006@gmail.com

[Forgot Password?](#)

☐ I'm not a robot

reCAPTCHA
Privacy • Terms

Login

Creating Developer Account:

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

The screenshot shows a web browser window with the Salesforce Developer Edition signup form. The browser's address bar shows the URL `salesforce.com/form/developer-signup/?d=pb`. The page has a dark blue background with the Salesforce logo and the text "Build enterprise-quality apps fast and get hands-on with Agentforce and Data Cloud." Below this, there is a list of features: "Build apps fast with drag-and-drop tools", "Go further with Apex code", "Build AI agents with Agentforce", "Harmonize your data with Data Cloud", "Ground Agentforce with structured and unstructured data", and "Integrate with anything using APIs". On the right side, there is a white form titled "Sign up for your Developer Edition" with the subtitle "A free Salesforce Platform environment with Agentforce and Data Cloud". The form contains several input fields: "First name" (Srisanth), "Last name" (S), "Job title" (developer), "Work email" (srisanthsr2006@gmail.com), "Company" (Hindusthan College), and "Country/Region" (India). Below these fields, there is a checkbox for "I agree to the Main Services Agreement - Developer Services and Salesforce Program Agreement" which is checked. At the bottom of the form, there is a "I'm not a robot" checkbox and a reCAPTCHA logo. The Windows taskbar is visible at the bottom of the screen.

Sign up for your Developer Edition

A free Salesforce Platform environment with Agentforce and Data Cloud

First name Last name

Srisanth S

Job title Work email

developer srisanthsr2006@gmail.com

Company Country/Region

Hindusthan College India

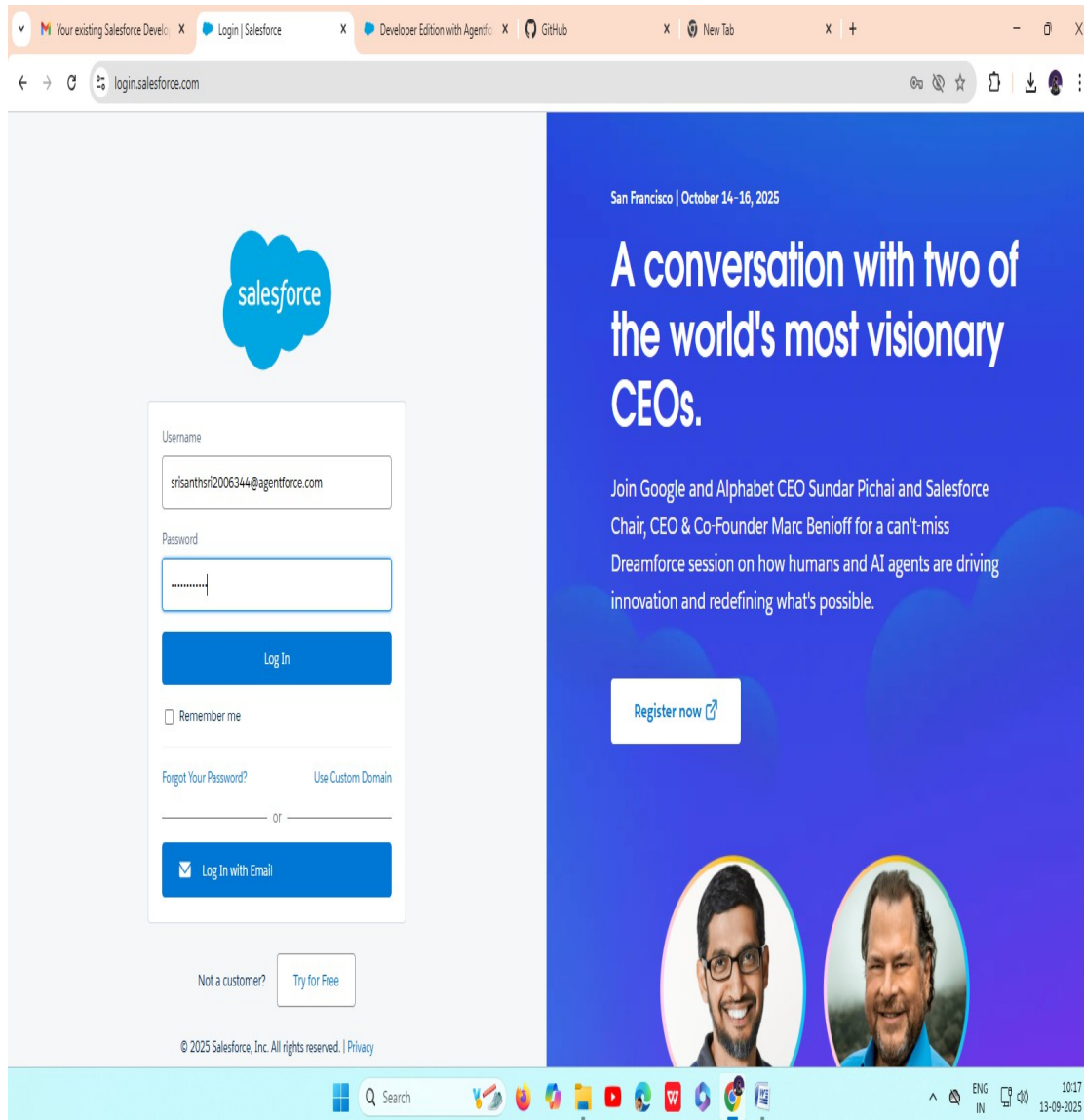
Your org may be provisioned on or migrated to Hyperforce, Salesforce's public cloud infrastructure.

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

We value your privacy. To learn more, visit our [Privacy Statement](#).

☒ I'm not a robot

ACCOUNT ACTIVATION:



- It will redirect to your salesforce setup page.

Creating a Product Object :

New Custom Object

[Help for this Page](#)

Permissions for this object are disabled for all profiles by default. You can enable object permissions in permission sets or by editing custom profiles. [Tell me more!](#) [Don't show this message again](#)

Custom Object Definition Edit

SaveSave & NewCancel

Custom Object Information

Required Information

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

Label Example: Account

Plural Label Example: Accounts

Starts with vowel sound ☐

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

Object Name Example: Account

Description

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

Content Name

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.

Record Name Example: Account Name

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

Creating a tab for Product Object:

The screenshot shows the Salesforce Setup Home page. The left sidebar contains a search bar with 'tabs' entered, and a list of links under 'User Interface' including 'Rename Tabs and Labels' and 'Tabs'. The main content area has a 'Home' header with a 'Create' button. Below the header are three featured cards: 'Data Cloud', 'Get Started with Einstein Bots', and 'Mobile Publisher'. At the bottom, there is a 'Most Recently Used' section with a table of 10 items.

NAME	TYPE	OBJECT
CalculateTotalAmountHandler	Apex Class	
CalculateTotalAmountTrigger	Apex Trigger	Order Item
srisanth S	User	

New Custom Object Tab

[Help for this Page](#)

Step 1. Enter the Details

Step 1 of 3

Choose the custom object for this new custom tab. Fill in other details.

New Custom Object Tab

***** Required Information

Select an existing custom object or [create a new custom object now](#)

Object **--None--**

Tab Style **[Style]**

(Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab.

Splash Page Custom Link **--None--**

Enter a short description.

Description

Next Cancel






Custom Tabs

[Help for this Page](#)

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 [New](#) [What Is This?](#)

Action	Label	Tab Style	Description
Edit Del	Inventory Transactions	 Cup	
Edit Del	Order Items	 Bell	
Edit Del	Products	 Bell	
Edit Del	Purchase Orders	 Bell	
Edit Del	Supplier objects	 Cup	

Web Tabs [New](#) [What Is This?](#)

No Web Tabs have been defined

Visualforce Tabs [New](#) [What Is This?](#)

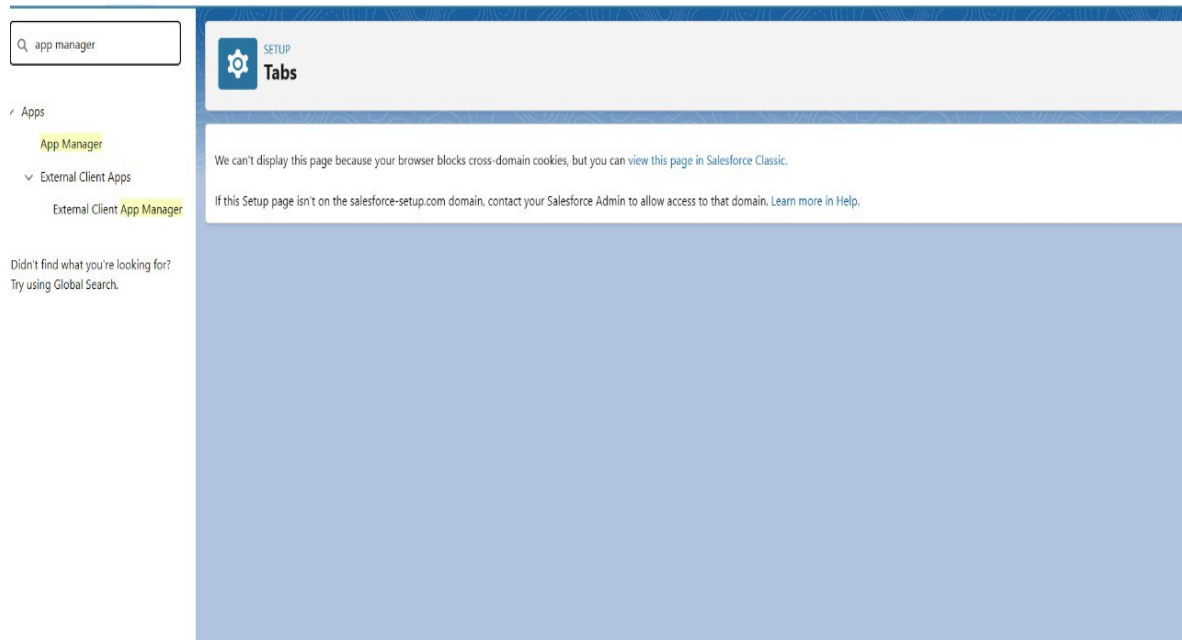
No Visualforce Tabs have been defined

Lightning Component Tabs [New](#) [What Is This?](#)

No Lightning component tabs have been defined

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

Create a Lightning App :



The screenshot shows the 'New Lightning App' form in Salesforce Setup. The form is divided into two main sections: 'App Details' and 'App Branding'. The 'App Details' section includes fields for 'App Name', 'Developer Name', and 'Description'. The 'App Branding' section includes an 'Image' upload field, a 'Primary Color Hex' field, and an 'Org Theme Options' checkbox. A progress bar at the bottom indicates the current step, and a 'Next' button is visible.

App Details

- * App Name: Medical Inventory Management
- * Developer Name: Medical_Inventory_Management
- Description: Enter a description...

App Branding

- Image: Upload
- Primary Color Hex Value: #0070D2
- Org Theme Options: ☐ Use the app's image and color instead of the org's custom theme

App Launcher Preview

Next

App Name	App Type	App Description	App Status	App Version
Lightning Usage App	LightningInstrumentation	View Adoption and Usage Metrics for Lightning Experience	9/3/2025, 2:05 PM	Lightning
Marketing CRM Classic	Marketing	Track sales and marketing efforts with CRM objects.	9/3/2025, 2:05 PM	Classic

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



- 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	✓

SaveQuick SavePreview As...CancelUndoRedoLayout Properties

Fields

ButtonsQuick ActionsMobile & Lightning ActionsExpanded LookupsRelated ListsReport Charts

Quick FindField Name

Section	Expiry Date	Product_ID
Blank Space	Last Modified By	Product Description
Created By	Minimum Stock Level	Product Name
Current Stock Level	Owner	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

EditDeleteCloneChange OwnerChange Record TypePrintable ViewSharingSharing HierarchyEdit Labels

Custom Buttons

Information (Header visible on edit only)

Product_ID	Sample Text	Unit Price	\$123.45
Product Name	Sample Text	Current Stock Level	12,515
Product Description	Sample Text	Minimum Stock Level	3,655
Expiry Date	9/12/2025	Owner	Sample Text

System Information (Header visible on edit only)

Created By	Sample Text	Last Modified By	Sample Text
------------	-------------	------------------	-------------

Product Compact Layouts

[Help for this Page](#)

New Compact Layout

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

SaveCancel

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

New Compact Layout

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

Name

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

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

Active ☒

Description

Quick Tips

- Operators & Functions

Error Condition Formula Required Information

Example: [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

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	<input type="text" value="Inventory Manager"/>

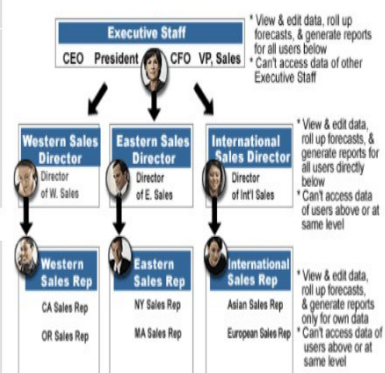
Understanding Roles

[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



☐ Don't show this page again

Create a Role:

 **SETUP**
Roles


Role Edit
New Role

Role Edit


Label

Purchasing Manager

Role Name

Purchasing_Manager 

This role reports to

SVP, Sales & Marketing 

Role Name as displayed on reports

Save

Save & New

Cancel

Save

Cancel

Enter permission set information

I = Required Information

Label

Purchase Manager Create Access

API Name

Purchase_Manager_Create_Access

i

Description

Session Activation Required

☐

i

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.

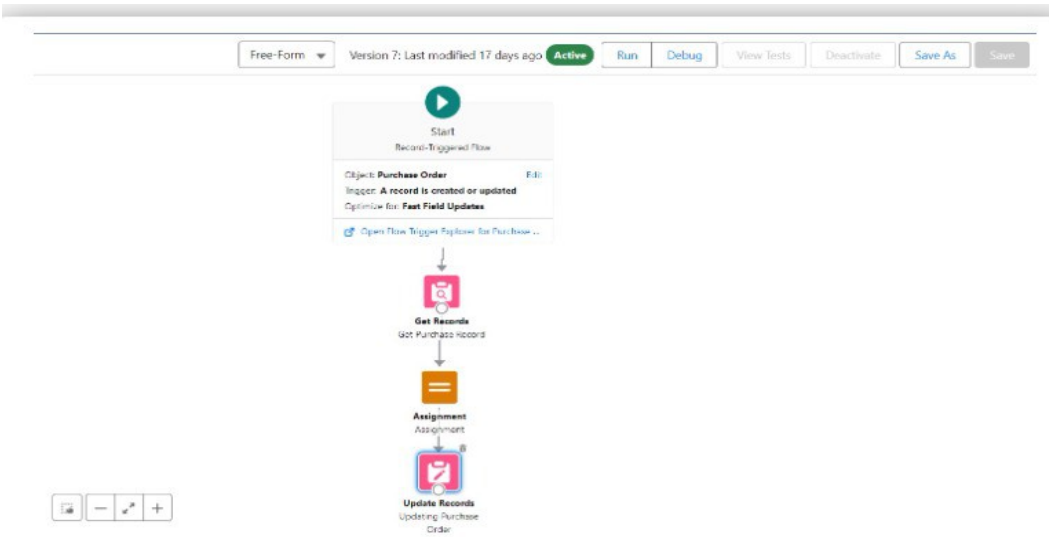
Not sure what a permission set license is? [Learn more here.](#)

License

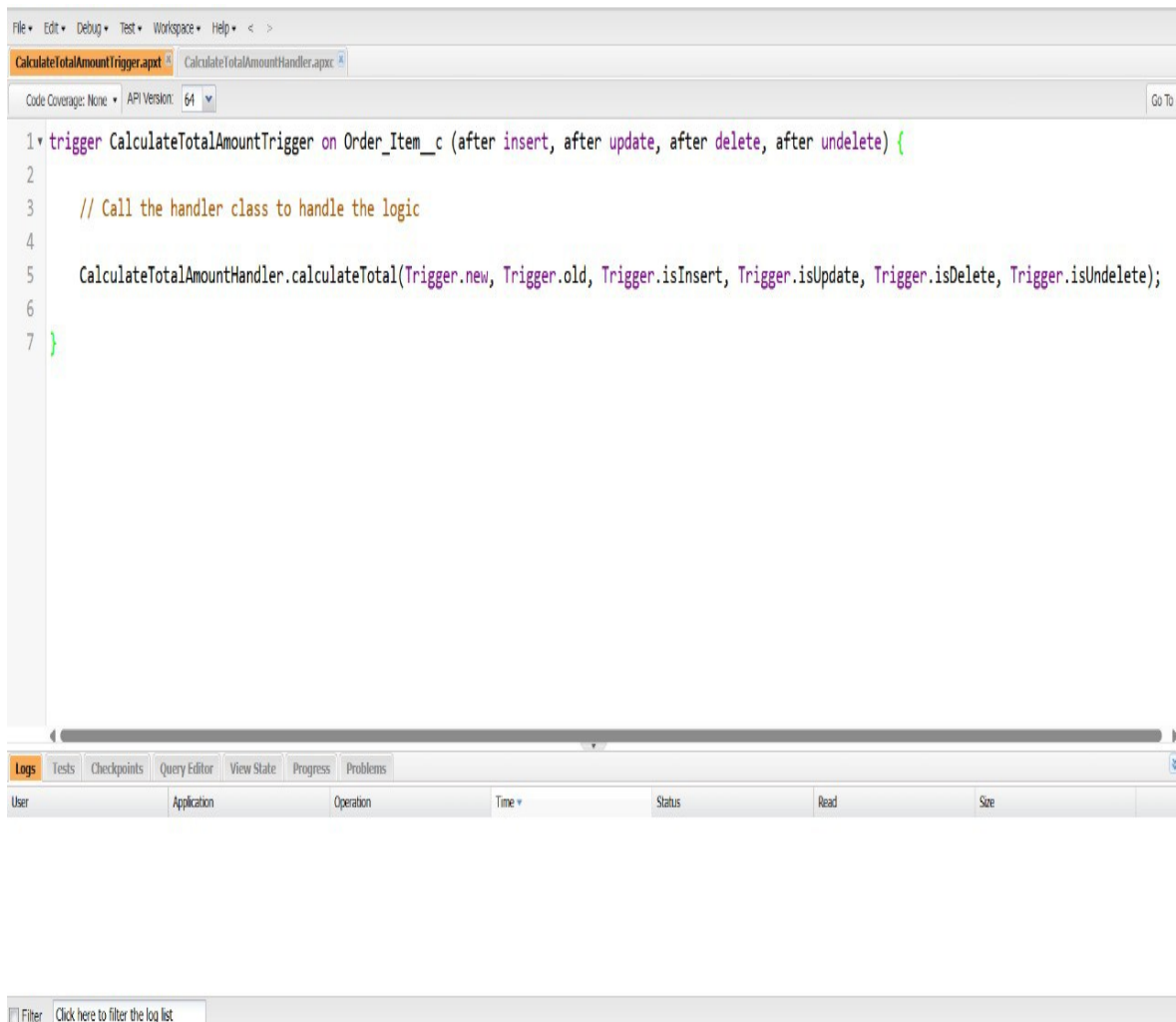
-None-

Save

Cancel



Create a Trigger to Calculate total amount on Order Item :










The screenshot shows an IDE window with two tabs: 'CalculateTotalAmountTrigger.apxc' (active) and 'CalculateTotalAmountHandler.apxc'. The main editor displays the following Apex code:

```
1 trigger 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 }
```

Below the editor is a toolbar with tabs: 'Logs', 'Tests', 'Checkpoints', 'Query Editor', 'View State', 'Progress', and 'Problems'. The 'Logs' tab is selected, showing a table with columns: User, Application, Operation, Time, Status, Read, and Size. At the bottom, there is a 'Filter' button and a text input field with the placeholder 'Click here to filter the log list'.

Reports :





Medical Inventory ...

Products ▾

Purchase Orders ▾

Order Items ▾

Inventory Transactions ▾

Supplier objects ▾

Reports ▾


Dashboards ▾

Reports



Recent

New Report

New Folder



2 items

REPORTS	Report Name ▾	Description ▾	Folder ▾	Created By ▾	Created On ▾	Subscribed
Recent	Complete Purchase Details Report		Medical Inventory Management	srisanth S	9/12/2025, 2:40 AM	
Created by Me	Purchase Orders based on Suppliers		Medical Inventory Management	srisanth S	9/12/2025, 2:35 AM	
Private Reports						
Public Reports						
All Reports						
FOLDERS						
All Folders						
Created by Me						
Shared with Me						
FAVORITES						
All Favorites						

Dash Boards :

The screenshot displays a web application interface with a top navigation bar and a main content area. The navigation bar includes a search bar, a user profile icon, and a menu with items like 'Medical Inventory ...', 'Products', 'Purchase Orders', 'Order Items', 'Inventory Transactions', 'Supplier objects', 'Reports', and 'Dashboards'. The 'Dashboards' menu is currently selected. Below the navigation bar, there is a toolbar with buttons for '+ Widget', '+ Filter', and 'Save', along with a 'Done' button. The main content area is a grid of dashboard widgets. A 'New Dashboard' modal form is open in the center, allowing users to create a new dashboard. The form has a title 'New Dashboard' and a close button (X). It contains three input fields: 'Name' (with a red asterisk indicating it is required), 'Description', and 'Folder'. The 'Name' field is filled with 'Medical Inventory DashBoard'. The 'Folder' field is filled with 'Private Dashboards' and has a 'Select Folder' button next to it. At the bottom of the modal, there are 'Cancel' and 'Create' buttons.

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

Sum of Total Order Cost

Supplier ID

Supplier-001

Supplier-002

₹4.5k

₹26k

₹22k

View Report (Purchase Orders based on Suppliers)

Cancel

Add

