

MEDICAL INVENTORY MANGEMENT

College Name: Vidyasagar college of arts and science

College Code: bru30

TEAM ID: NM2025TMID26938

TEAM MEMBERS:

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1. INTRODUCTION

1.1 project overview

This project is a comprehensive Salesforce application to streamline and manage various operational aspects of medical inventory. The system aims to efficiently maintain supplier details, manage purchase orders, track product details and transactions, and monitor the expiry dates of products. Maintain detailed records of suppliers, including contact information. Catalog product information, including descriptions, stock levels. Monitor and track product expiry dates to avoid using expired items. Comprehensive reports to track supplier performance, and purchase orders.

1.2 purpose

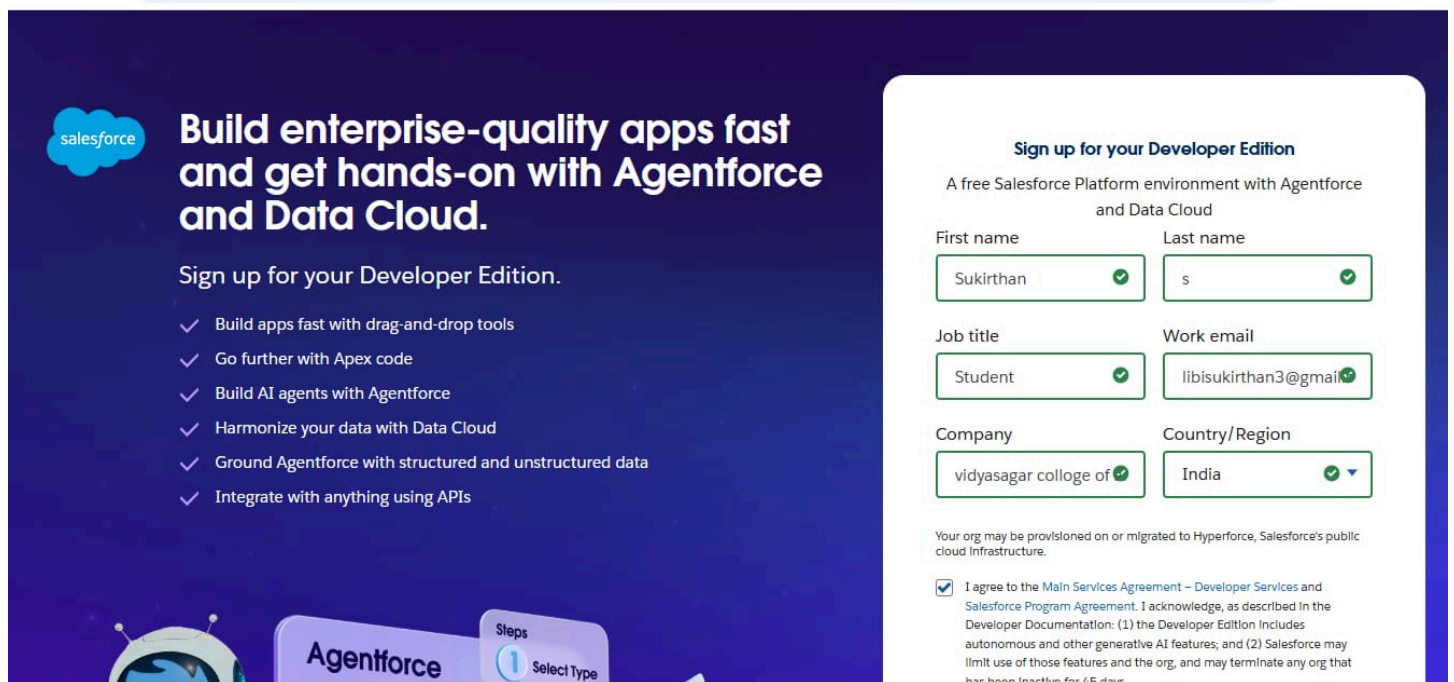
The main objective of the project is to provide a centralized system that helps healthcare organizations efficiently track, control, and optimize their medical supplies and equipment. It ensures real-time visibility of stock levels, prevents shortages or overstocking, and reduces waste by monitoring expiry dates and usage patterns. By automating processes such as reordering, alerts, and reporting, it saves time and lowers costs while also supporting regulatory compliance through accurate record-keeping. Ultimately, effective medical inventory management improves patient care by ensuring that essential medicines and equipment are always available when needed

DEVELOPMENT PHASE

Creating developer account:

by using this URL:

<https://naanmudhalvan.smartinternz.com>



The image shows a screenshot of the Salesforce Developer Edition sign-up page. The background is dark blue with the Salesforce logo and text: "Build enterprise-quality apps fast and get hands-on with Agentforce and Data Cloud." Below this, it says "Sign up for your Developer Edition." and lists six benefits: "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". At the bottom, there's a graphic with "Agentforce" and "Steps 1 Select Type".

Sign up for your Developer Edition

A free Salesforce Platform environment with Agentforce and Data Cloud

First name: Sukirthan ✓ Last name: s ✓

Job title: Student ✓ Work email: libisukirthan3@gmail.com ✓

Company: vidyasagar college of ✓ Country/Region: 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.

- Create objects: product, purchase order,order item, and inventory transaction and supplier objects

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

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

- Purchase Order Object

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

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

- Order item object

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

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

- Supplier object

SETUP > OBJECT MANAGER

Supplier objects

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

Details

EditDelete

Description

API Name

Supplier_objects__c

Custom

✓

Singular Label

Supplier objects

Plural Label

Supplier objects

Enable Reports

✓

Track Activities

✓

Track Field History

✓

Deployment Status

Deployed

Help Settings

Standard salesforce.com Help Window

- Created tabs : Purchase, Purchase Order,Item Order, Inventory transaction and Supplier objects

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.

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

Web Tabs

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

<https://orgfarm-4185ba1948-dev-ed.develop.lightning.force.com/lightning/setup/CustomTabs/home>

- Created a text field, text area field , number field, currency field, data field in product object

Setup

Home

Object Manager

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

Fields & Relationships

12 Items, Sorted by Field Label

Quick Find

New

Deleted Fields

Field Dependencies

Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Current Stock Level	Current_Stock_Level__c	Number(18, 0)		
Last Modified By	LastModifiedById	Lookup(User)		
Minimum Stock Level	Minimum_Stock_Level__c	Number(10, 0)		
Order Count	Order_Count__c	Master-Detail(Purchase Order)		✓
Order Date	Order_Date__c	Date		
Owner	Owner__c	Lookup(User)		✓

- Created a Text Field, Lookup relationship, Date field, Roll-up summary Field, Currency field in purchase Order Object.

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

Fields & Relationships

10 Items, Sorted by Field Label

Quick Find

New

Deleted Fields

Field Dependencies

Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Actual delivery date	Actual_delivery_date__c	Date		
Created By	CreatedById	Lookup(User)		
Expected Delivery Date	Expected_Delivery_Date__c	Date		
Last Modified By	LastModifiedById	Lookup(User)		
Order Count	Order_Count__c	Roll-Up Summary (COUNT Product)		
Order Date	Order_Date__c	Date		
Owner	OwnerId	Lookup(User,Group)		✓

- Created a Text Field, Lookup Relationship, Master detail, Number Field, Formula Field in Order Itemobject

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

Fields & Relationships

10 Items, Sorted by Field Label

Q Quick Find

New


Deleted Fields

Field Dependencies

Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Amount	Amount__c	Currency(16, 2)		
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Order Item id	Name	Text(80)		✓
Owner	OwnerId	Lookup(User,Group)		✓
Product Id	Product_Id__c	Text(18)		
Purchase Order Id	Purchase_Order_Id__c	Text(18)		

- Created a Text Field, Lookup Relationship, Date Field, Picklist Field, Formula Field in Inventory Transaction Object.



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

Fields & Relationships
 9 Items, Sorted by Field Label

New
 Deleted Fields
 Field Dependencies
 Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Inventory Name	Name	Text(80)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Purchase Order Id	Purchase_Order_Id__c	Lookup(Purchase Order)		✓
Total order cost	Total_order_cost__c	Currency(18, 0)		
Transaction Date	Transaction_Date__c	Date		
Transaction Id	Transaction_Id__c	Text(50)		

- Created a Text field, Phone Field, Email Field, Text Area Field in Supplier Object.

SETUP > OBJECT MANAGER
Supplier objects


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

Fields & Relationships
 10 Items, Sorted by Field Label

New
 Deleted Fields
 Field Dependencies
 Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Address	Address__c	Long Text Area(32768)		
Contract Person	Contract_Person__c	Text(100)		
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		

- Created a product in medical inventory



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Medical Inventory ...

Home

Products

Order Items


Inventory Transactions

Supplier objects

Reports

Dashboards

Purchase Orders

 Product **P0-0003**

New Contact

Edit

New Opportunity

Related

Details

Product ID

P0-0003

Product name

0003


Order Count

P0-0003

Product Description

Dolo 650

Created By

 Sukirthan s. 9/7/2025, 5:56 AM

Unit Price

\$40.00


Current Stock Level

700


Minimum Stock Level

500

Owner

 John PurchaseM

Last Modified By

 Sukirthan s. 9/7/2025, 5:56 AM

Activity

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✉️

Filters: All time • All activities • All types

Refresh

Expand All

View All

Upcoming & Overdue

No activities to show.
Get started by sending an email, scheduling a task, and more.




No past activity. Past meetings and tasks marked as done show up here.

- Created a supplier object in medical inventory

Medical Inventory ... Home Products Order Items Inventory Transactions **Supplier objects** Reports Dashboards Purchase Orders

Supplier objects **dolo340** New Contact Edit New Opportunity

Details

Supplier objects Name	dolo340	Phone Number	(876) 543-7808
Supplier id	0004	Email	johanjohan33@gmail.com
Supplier Name	johan	Address	Asturila
Contract Person	johan	Owner	 Sukirthan s
Created By	 Sukirthan s, 9/8/2025, 6:47 AM	Last Modified By	 Sukirthan s, 9/8/2025, 6:47 AM

Activity

Filters: All time • All activities • All types

[Refresh](#) • [Expand All](#) • [View All](#)

Upcoming & Overdue

No activities to show.
Get started by sending an email, scheduling a task, and more.




No past activity. Past meetings and tasks marked as done show up here.

- Created an inventory transaction in medical inventory and named as purchasing manager

Medical Inventory ... Home Products Order Items **Inventory Transactions** Supplier objects Reports Dashboards Purchase Orders

Inventory Transaction **Purchasing Manager** New Contact Edit New Opportunity

Details

Inventory Name	Purchasing Manager	Owner	 Sukirthan s
Transaction Id	005		
Purchase Order Id	PO-0003		
Transaction Type	Purchase		
Transaction Date	9/6/2025		
Total order cost	\$45,000		
Created By	 Sukirthan s, 9/8/2025, 6:49 AM	Last Modified By	 Sukirthan s, 9/8/2025, 6:49 AM

Activity

Filters: All time • All activities • All types

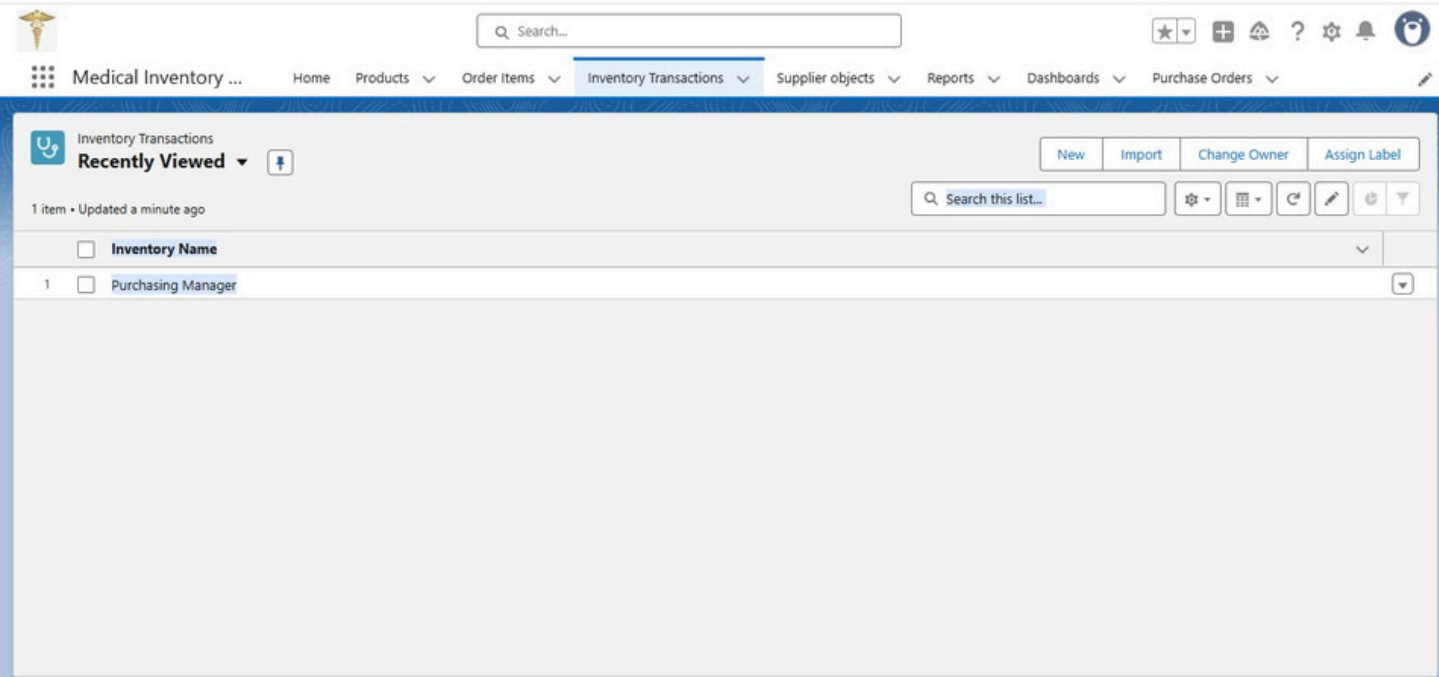
[Refresh](#) • [Expand All](#) • [View All](#)

Upcoming & Overdue


No activities to show.
Get started by sending an email, scheduling a task, and more.

No past activity. Past meetings and tasks marked as done show up here.

- In medical inventory the inventory transaction that are created is given below in picture



- In medical inventory the product that are created is given below in picture



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


Products
Recently Viewed

New
Import
Assign Label

2 items • Updated a few seconds ago

	Product ID	
1	<input type="checkbox"/> PO-0003	
2	<input type="checkbox"/> PO-0002	

- In medical inventory these are the reports that are created



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

Reports
Recent

New Report
New Folder

2 items

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	Purchase Orders with Order Items	Purchase Orders with Order Items and Product ID	Private Reports	Sukirthan s	9/7/2025, 8:05 AM	
Created by Me	Purchase Orders based on Suppliers		Private Reports	Sukirthan s	9/6/2025, 11:53 AM	
Private Reports						
Public Reports						
All Reports						
FOLDERS						
All Folders						
Created by Me						
Shared with Me						
FAVORITES						
All Favorites						

- Created a role in hierarchy

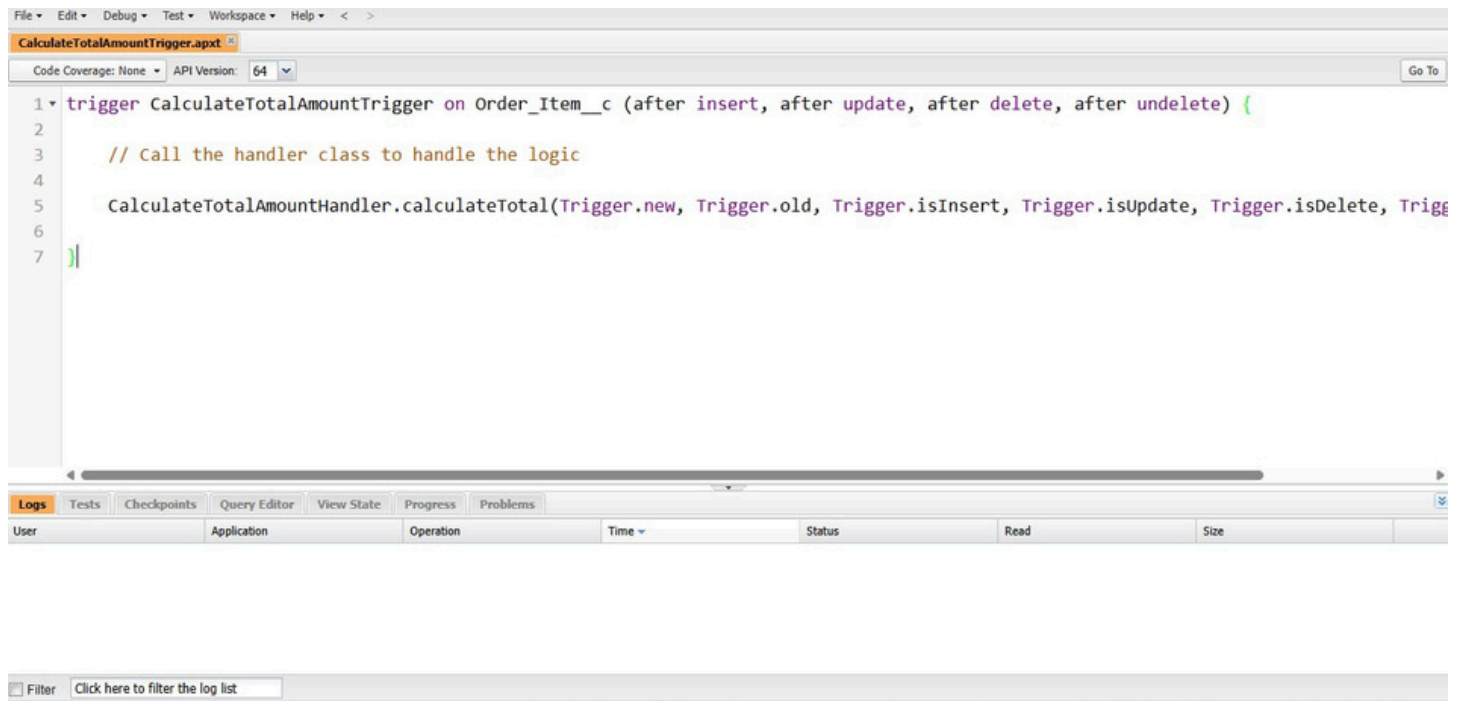
The screenshot shows the Salesforce Setup interface. The left sidebar contains a search bar with 'roles' and a navigation menu with categories: Users, Feature Settings, Sales, Service, and Case Teams. The 'Roles' link under 'Users' is highlighted. The main content area is titled 'Roles' and 'Creating the Role Hierarchy'. It includes a search bar, a 'Help for this Page' link, and a 'Show in tree view' button. The role hierarchy is displayed as a tree structure:

- vidyasagar collage of arts and science
 - Add Role
 - CEO
 - Add Role


Below the hierarchy, there are links for 'Collapse All' and 'Expand All'. At the bottom of the sidebar, a message states: 'Didn't find what you're looking for? Try using Global Search.'

- Creating a flow to update the actual delivery date

- Create a Trigger to Calculate total amount on Order Item.



- Purchase details



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

Report: Purchase Orders with Order Items and Product ID

Purchase Orders with Order Items and Product ID

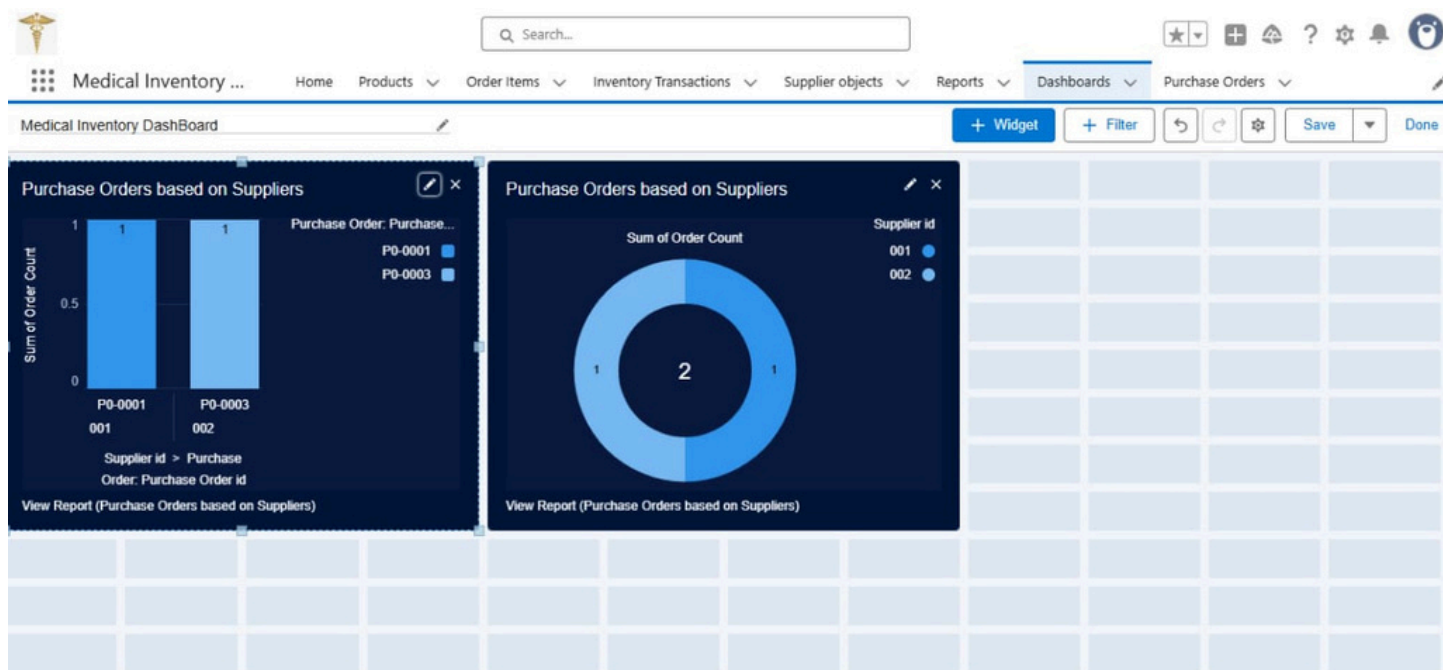
Enable Field Editing
Add Chart

Total Records	Total Order Count	Total Total order cost
2	2	\$53,900.00

Supplier id	Purchase Order id	Actual delivery date	Purchase Order ID	Order Count	Total order cost	Owner: Full Name
001 (1)	P0-0001 (1)	9/6/2025 (1)	a01gL00000Kn8x2	1	\$8,900.00	Sukirthan s
	Subtotal			1	\$8,900.00	
	Subtotal			1	\$8,900.00	
	Subtotal			1	\$8,900.00	
002 (1)	P0-0003 (1)	9/7/2025 (1)	a01gL00000KlJUp	1	\$45,000.00	Sukirthan s
	Subtotal			1	\$45,000.00	
	Subtotal			1	\$45,000.00	
	Subtotal			1	\$45,000.00	
Total (2)				2	\$53,900.00	

Row Counts
Detail Rows
Subtotals
Grand Total

- Create a new dashboard and name it as medical inventory and view it



Advantages and Disadvantages of Medical Inventory Management

□ Advantages

- Centralized Inventory Tracking – Manage all medicines, supplies, and equipment in one place.
- Real-Time Stock Visibility – Check available stock instantly across departments or branches.
- Automation – Auto-reordering when stock is low, expiry alerts, and stock updates.
- Integration – Connects with ERP, EHR, pharmacy, billing, and POS systems.
- Compliance Support – Helps follow FDA, HIPAA, CDSCO and other medical regulations.
- Advanced Reporting – Generate audit-ready reports on usage, expiry, and stock history
- Better Patient Care – Ensures required medicines and equipment are available on time.
- Scalability – Works for small clinics, hospitals, and large healthcare chains.
- Customization – Workflows, dashboards, and automation can be fully tailored.
- Improved Decision-Making – Data-driven insights help in better procurement planning.

- **Disadvantages**

- High Setup Cost – Salesforce licensing and customization are expensive.
- Complex Customization – Advanced medical inventory needs skilled Salesforce developers.
- Training Requirement – Staff, nurses, and pharmacists need proper training to use it.
- Internet Dependency – Being cloud-based, it requires a stable connection.
- Data Security Concerns – Sensitive healthcare data needs strict security controls.
- Ongoing Maintenance Costs – Continuous updates, integration fixes, and enhancements add expenses.
- Integration Challenges – Linking with existing hospital systems can be complex
- User Adoption Issues – If staff don't update stock properly, data becomes inaccurate.
- Compliance Risk – Misconfigured access or incorrect reporting may cause legal issues.
- Overkill for Small Clinics – For small setups, Salesforce may be too heavy and costly.

- **Conclusion**

- Medical inventory management in Salesforce provides healthcare organizations with a centralized, efficient, and automated platform to track, manage, and optimize their medical supplies. By integrating real-time inventory tracking, automated stock updates, and detailed reporting, Salesforce helps reduce manual errors, avoid stockouts or overstocking, and ensure timely availability of essential medical items.
- However, successful implementation requires proper configuration, user training, and data accuracy. When used effectively, Salesforce empowers hospitals, clinics, and healthcare providers to streamline operations, improve patient care, and reduce operational costs, making it a powerful solution for modern medical inventory management.