MEDICAL INVENTORY MANAGEMENT

College Name: Government arts college,coimbatore

College Code: BRU0012

TEAM ID: NM2025TMID23369

TEAM MEMBERS: 5

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Email: mariyappansundrammmal@gmail.com

Team Member Name 5 : ABISHEIK A
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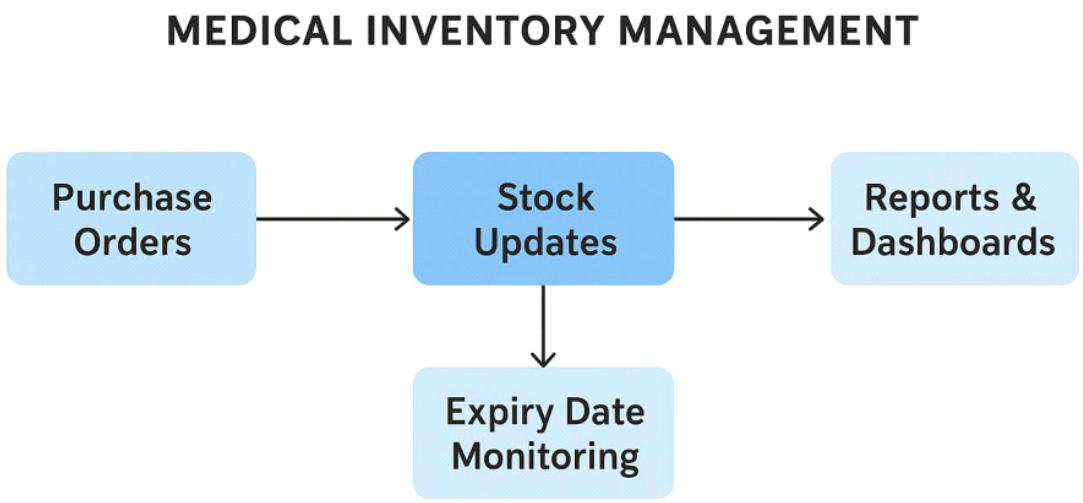
1.INTRODUCTION

1.1 Project Overview:

The Medical Inventory Management project in Salesforce is designed to help hospitals, clinics, and pharmacies efficiently manage their medical supplies such as medicines, syringes, gloves, and equipment. The system allows users to create purchase orders, record supplier details, and automatically update stock levels whenever items are received or used. It also tracks expiry dates to ensure safe usage of medicines and generates alerts for low stock to avoid shortages. With reports and dashboards, users can view purchase history, current stock levels, and overall inventory usage.



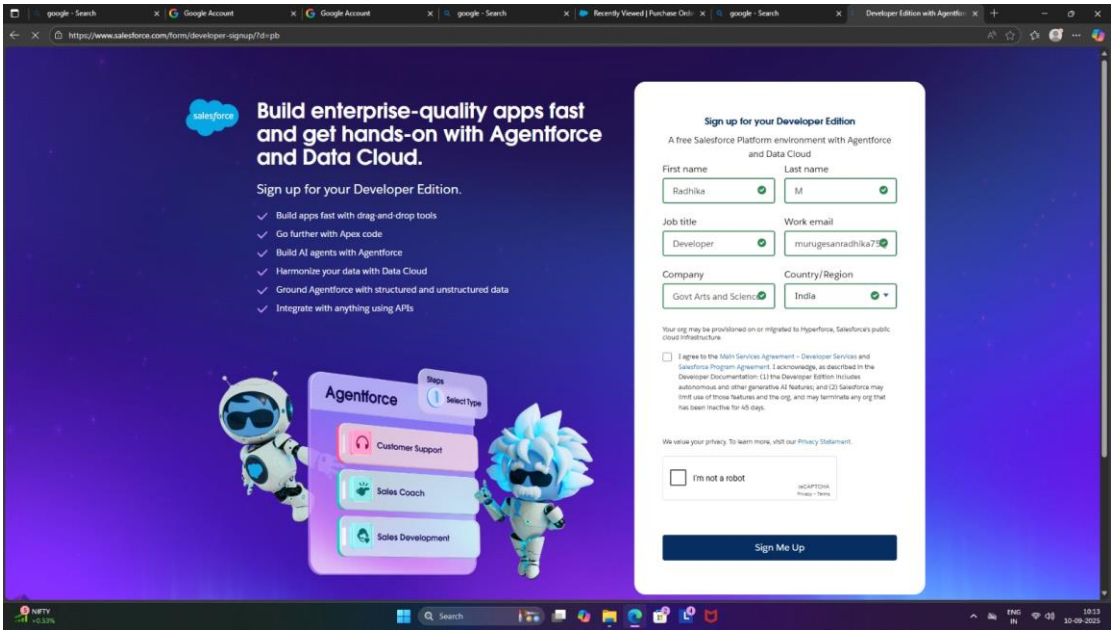
1.2 PURPOSE:

The purpose of this Medical Inventory Management project is to ensure accurate tracking and management of medical supplies in healthcare organizations. It helps prevent shortages and wastage by monitoring stock levels and expiry dates. Overall, it improves efficiency, reduces costs, and supports smooth hospital operations.

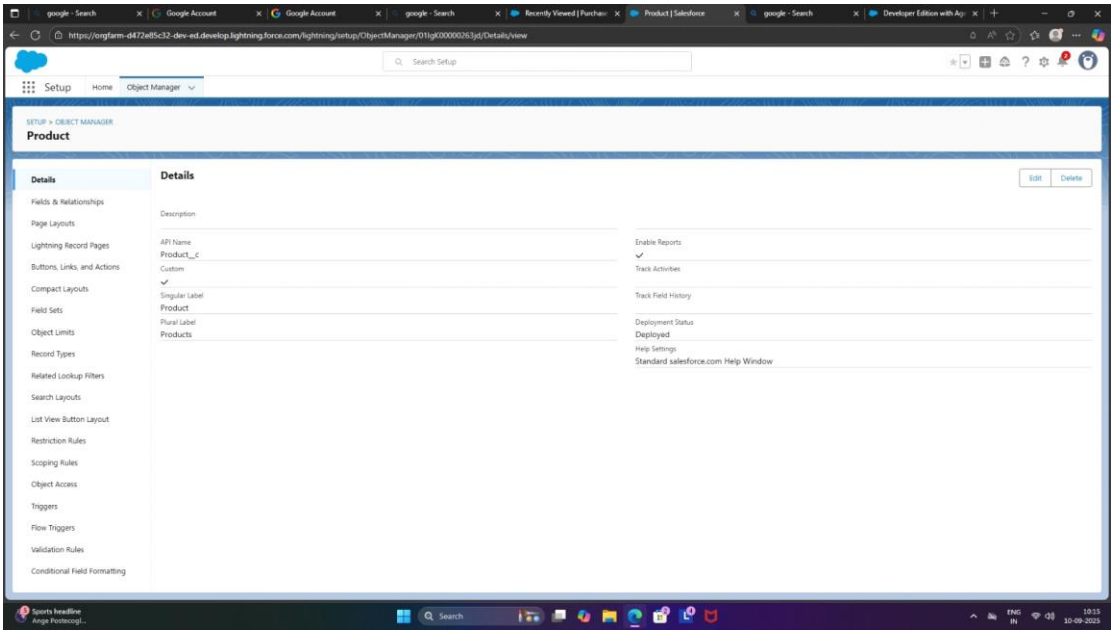
DEVELOPMENT PHASE

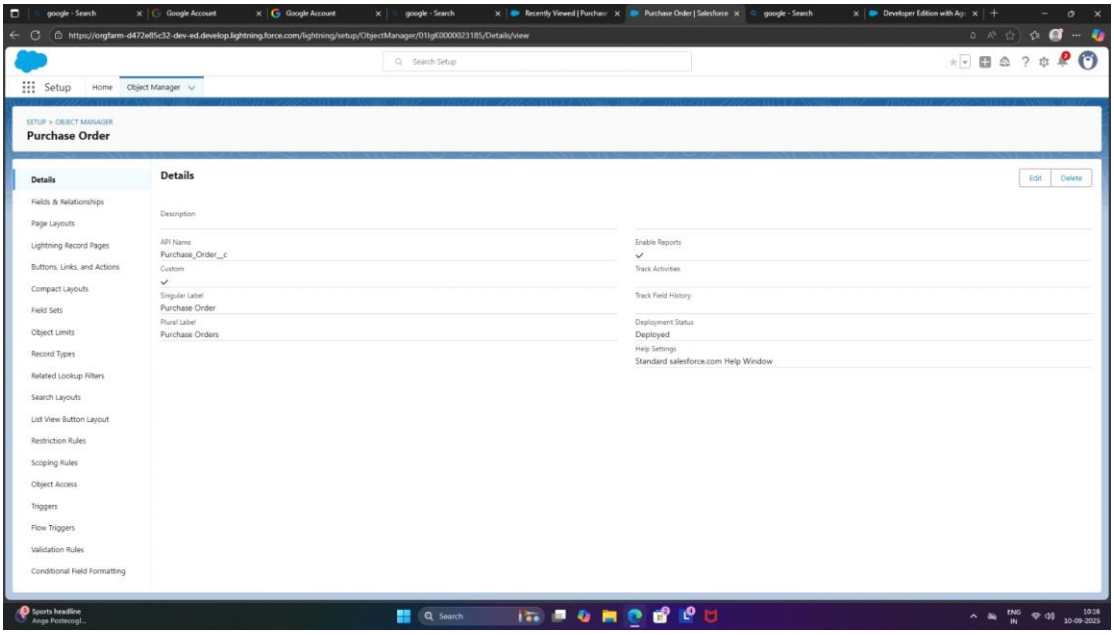
Creating Developer Account

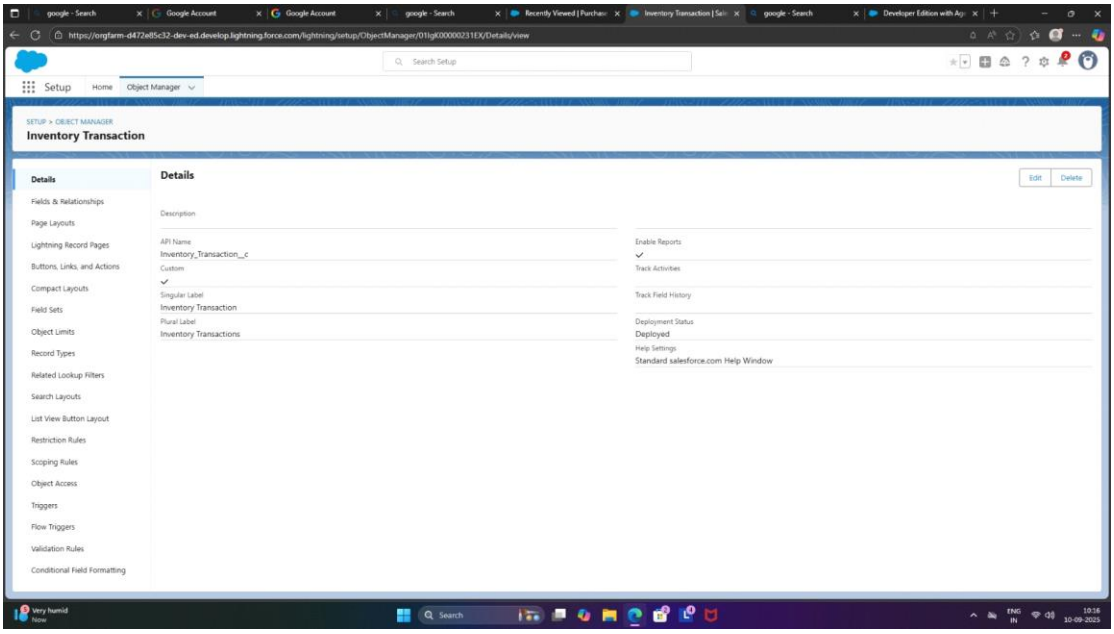
By using this URL -https://www.salesforce.com/form/developer-signup/?d=pb

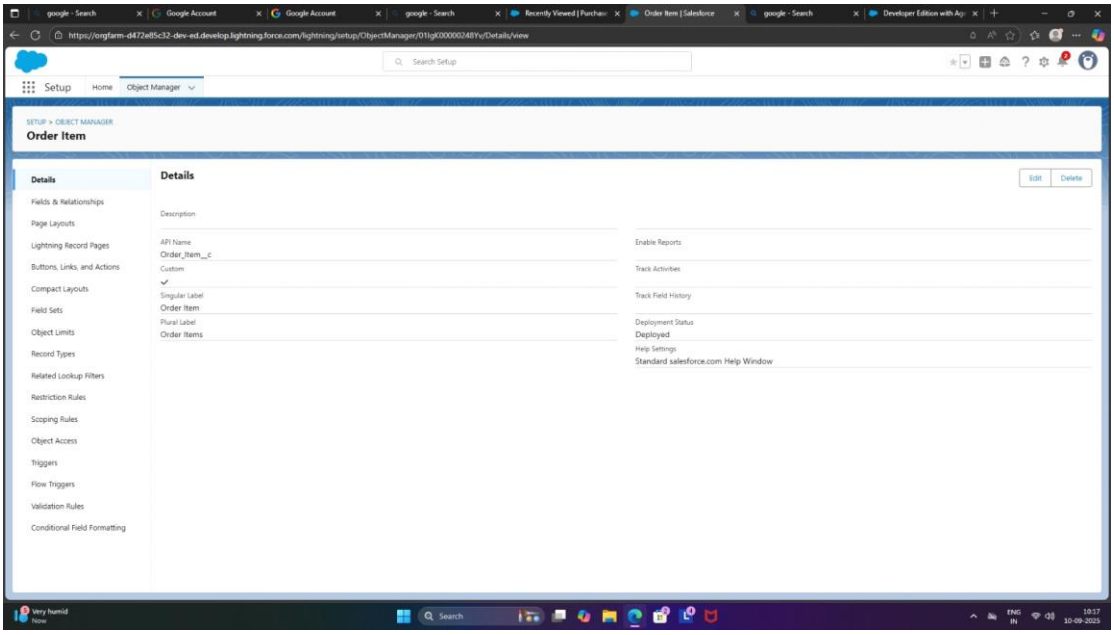


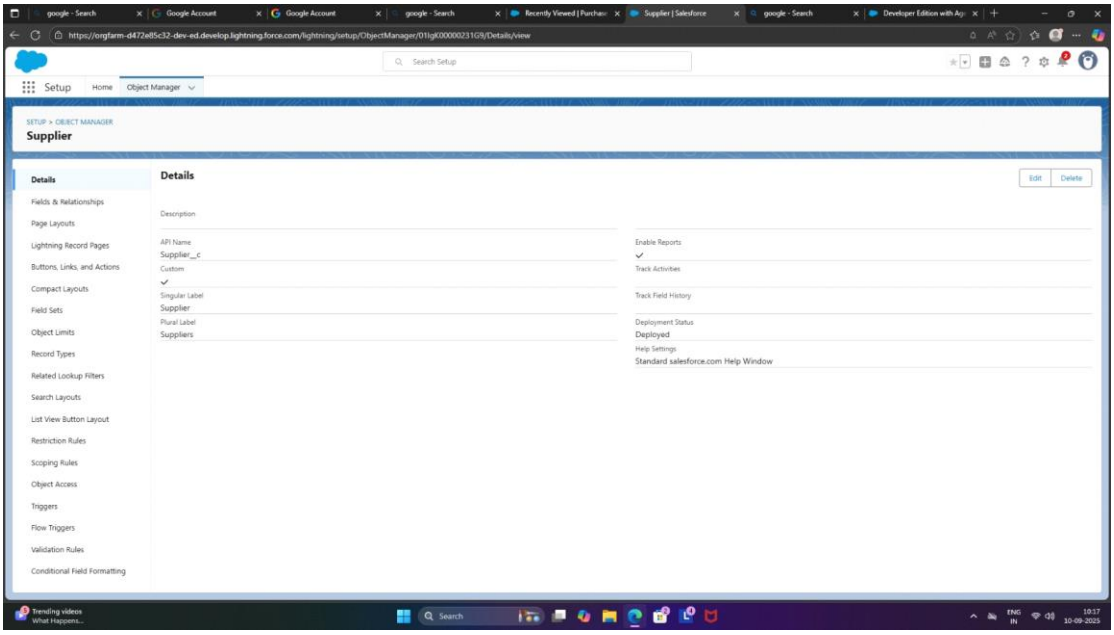
- Created objects: Product,Purchase orders,Inventortransaction.Supplier,Order items.



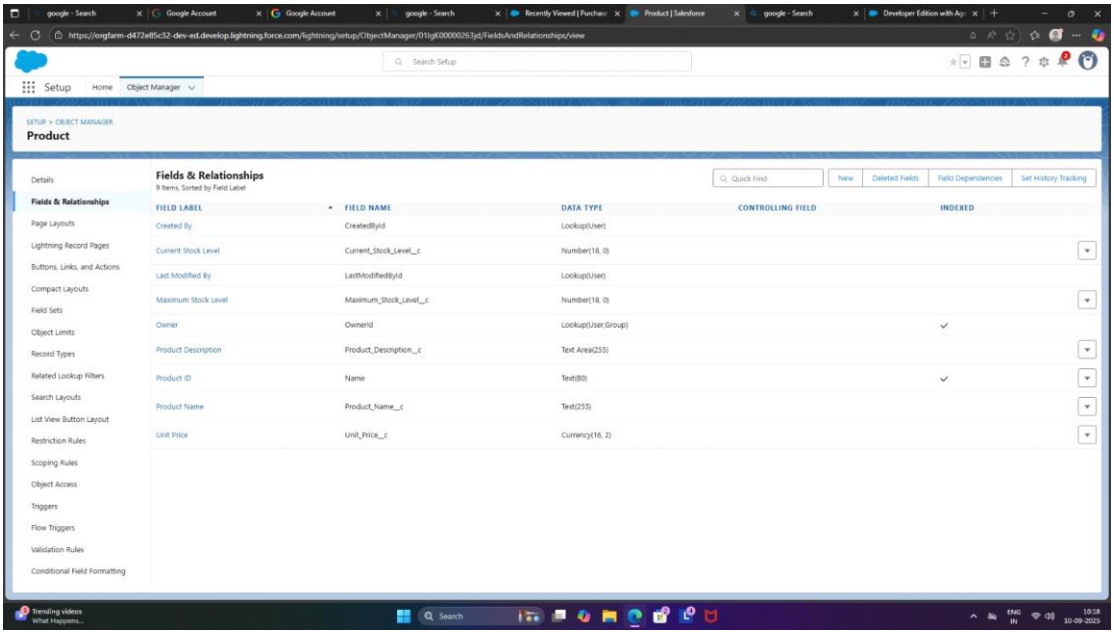

Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Purchase Order
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Scoping Rules
Object Access
Triggers
Flow Triggers
Validation Rules
Conditional Field Formatting
Details
Edit
Delete
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

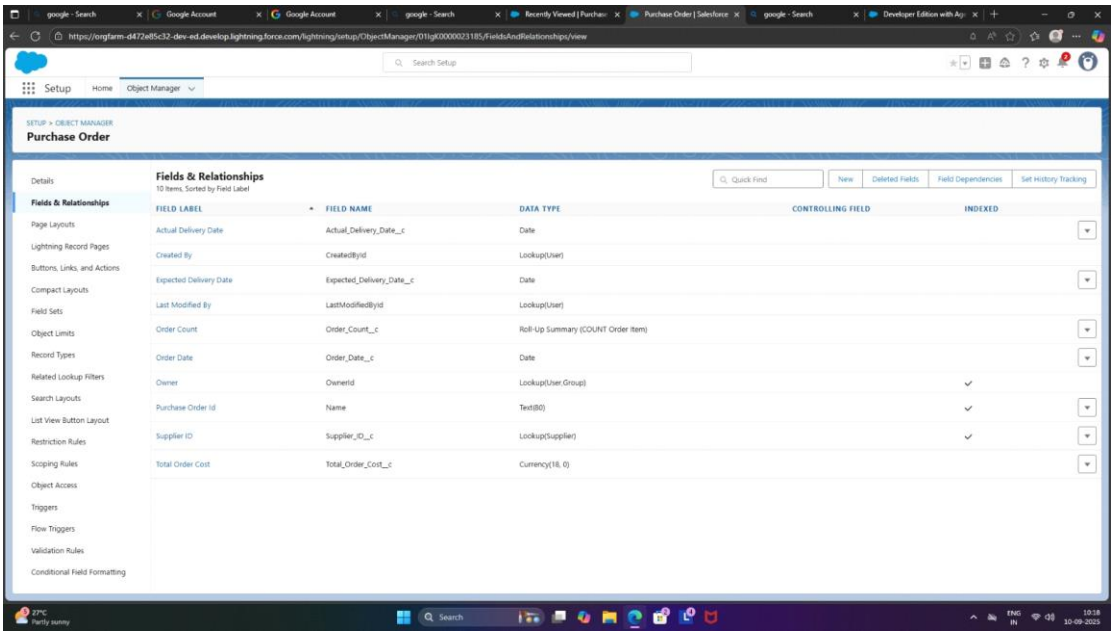

Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Inventory Transaction
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Scoping Rules
Object Access
Triggers
Flow Triggers
Validation Rules
Conditional Field Formatting
Details
Edit
Delete
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

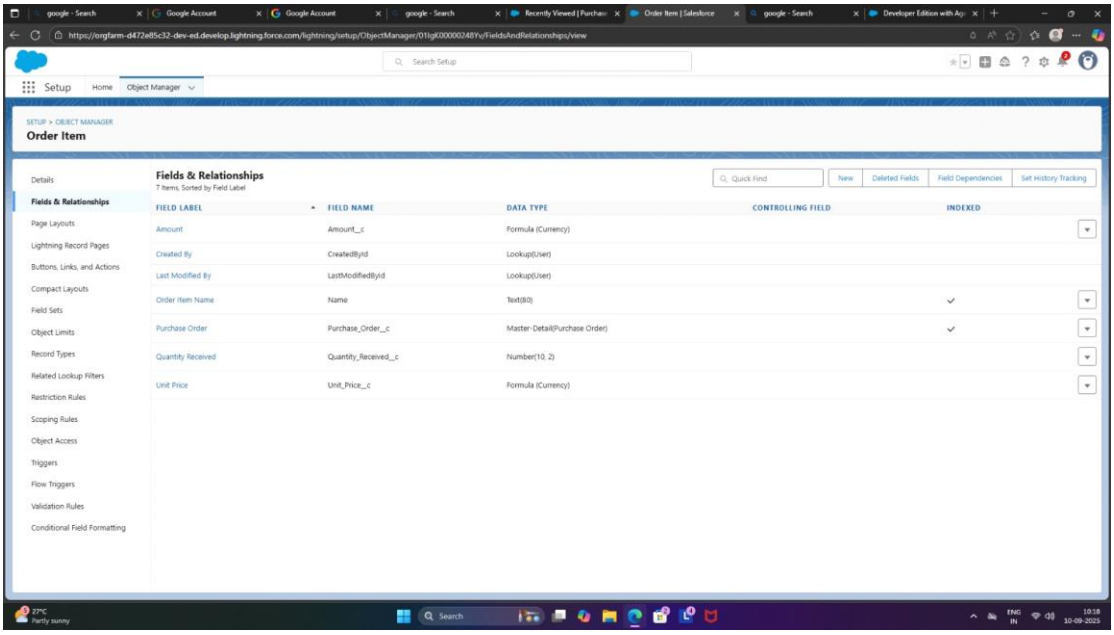


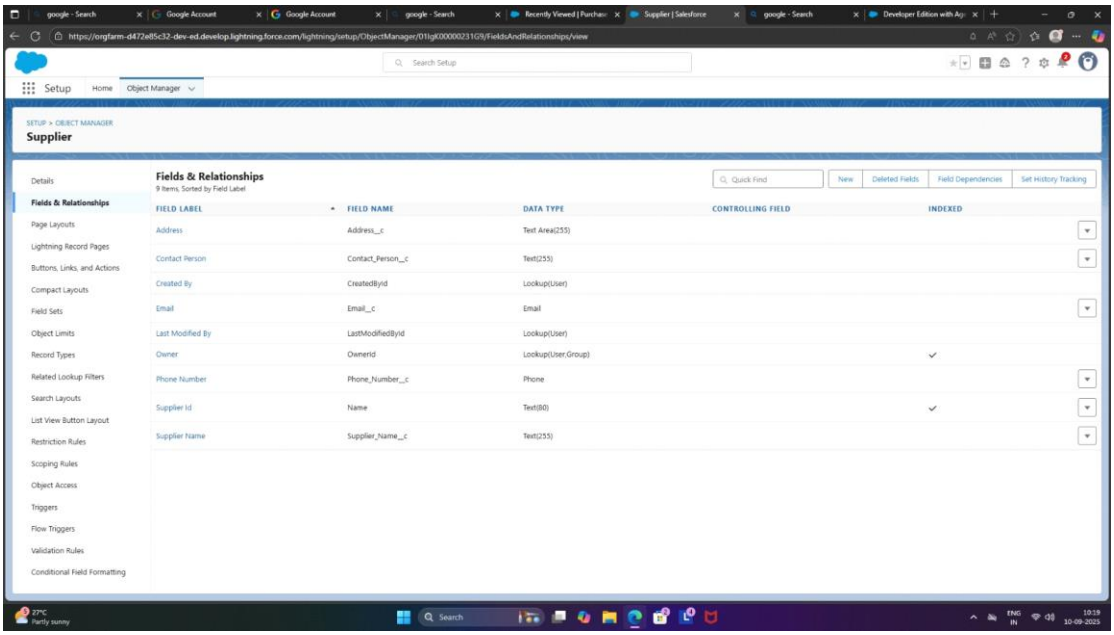


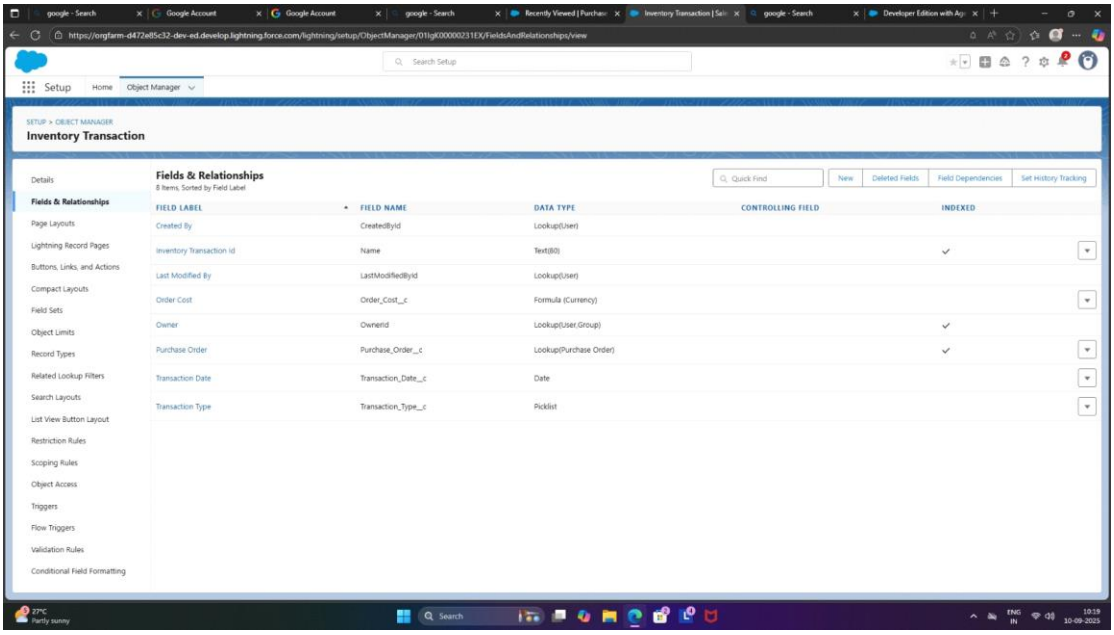
- Configured fields and relationships


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
List View Button Layout
Restriction Rules
Scoping Rules
Object Access
Triggers
Flow Triggers
Validation Rules
Conditional Field Formatting
Fields & Relationships
9 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)
Maximum Stock Level
Maximum_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)
Unit Price
Unit_Price__c
Currency(16, 2)

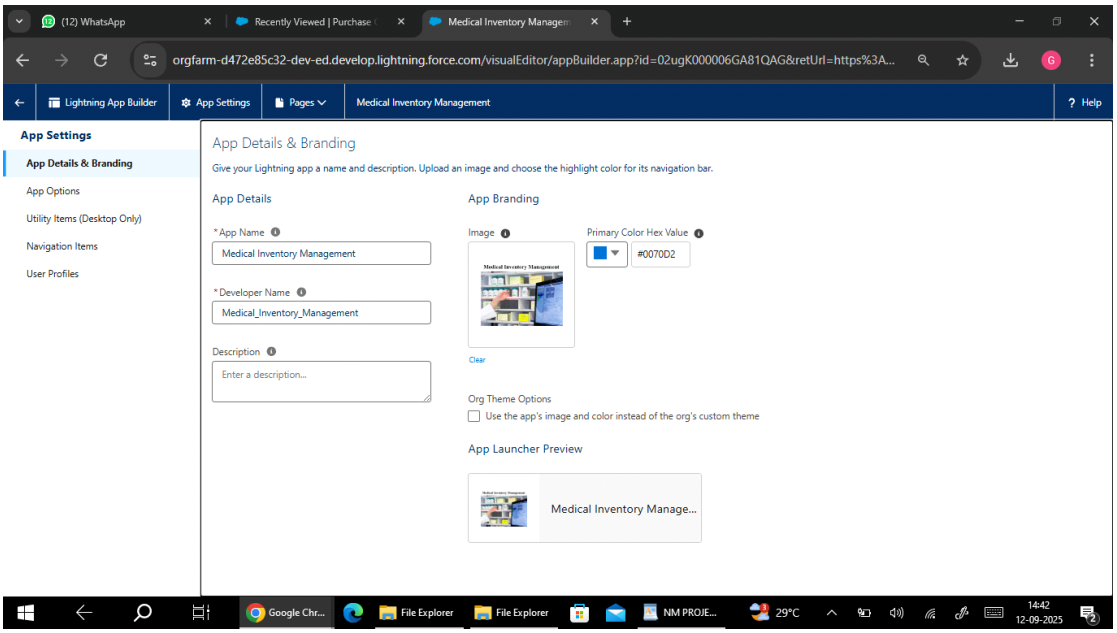

Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Purchase Order
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Scoping Rules
Object Access
Triggers
Flow Triggers
Validation Rules
Conditional Field Formatting
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 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(18, 0)

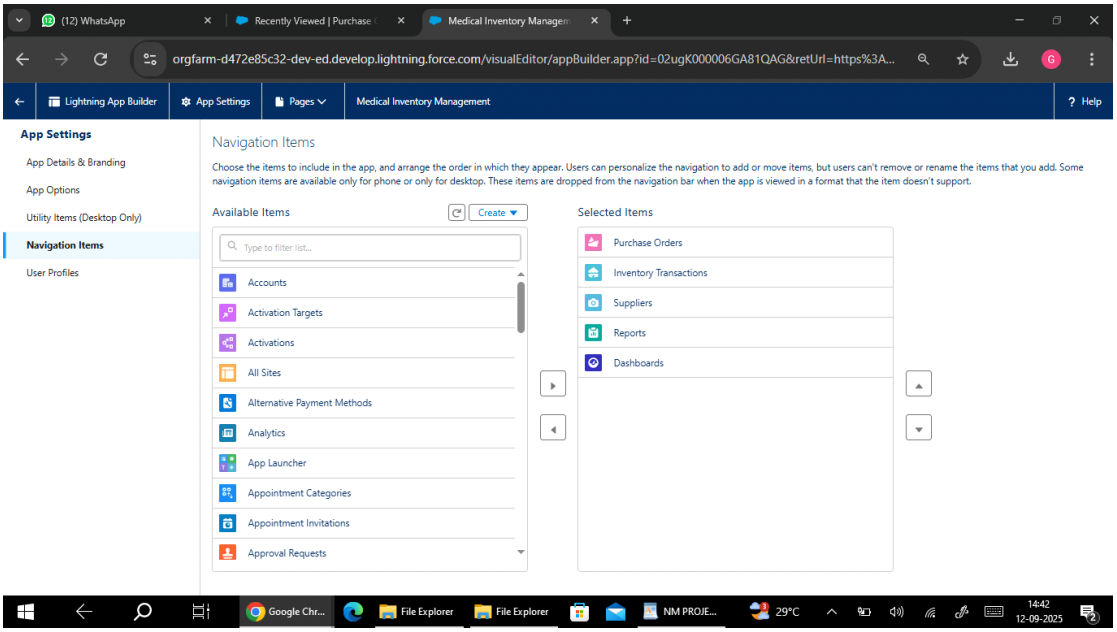

Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Order Item
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Restriction Rules
Scoping Rules
Object Access
Triggers
Flow Triggers
Validation Rules
Conditional Field Formatting
Fields & Relationships
7 Items, Sorted by Field Label
Quick Find
New
Deleted Fields
Field Dependencies
Set History Tracking
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 Name
Name
Text(80)
Purchase Order
Purchase_Order__c
Master-Detail(Purchase Order)
Quantity Received
Quantity_Received__c
Number(10, 2)
Unit Price
Unit_Price__c
Formula (Currency)

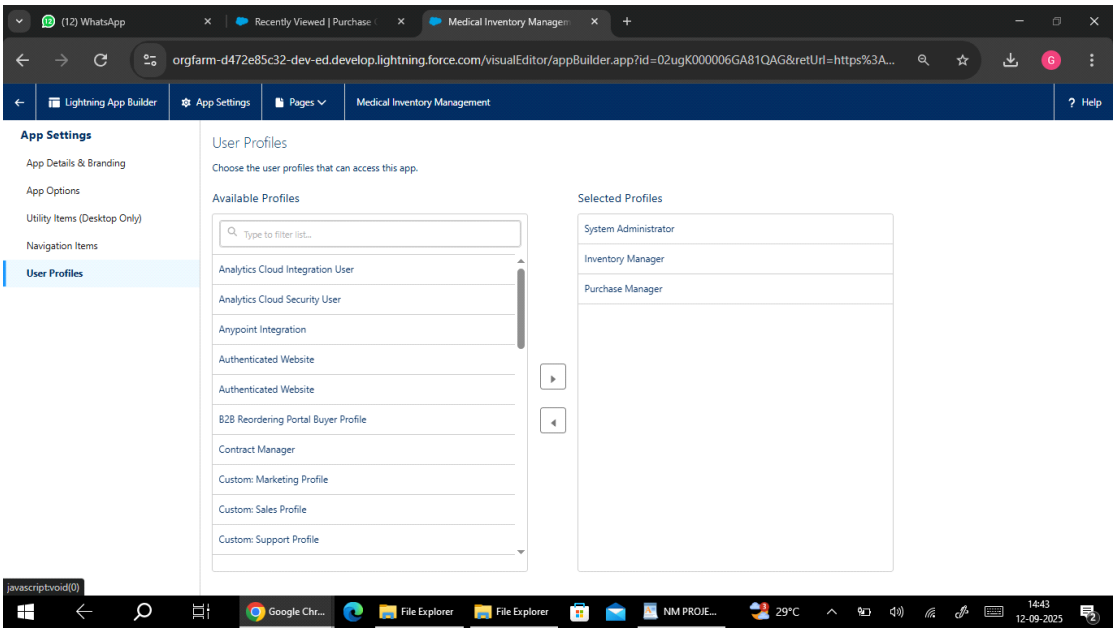

Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Supplier
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Scoping Rules
Object Access
Triggers
Flow Triggers
Validation Rules
Conditional Field Formatting
Fields & Relationships
9 Items, Sorted by Field Label
Quick Find
New
Deleted Fields
Field Dependencies
Set History Tracking
FIELD LABEL
FIELD NAME
DATA TYPE
CONTROLLING FIELD
INDEXED
Address
Address__c
Text Area(255)
Contact Person
Contact_Person__c
Text(255)
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(255)



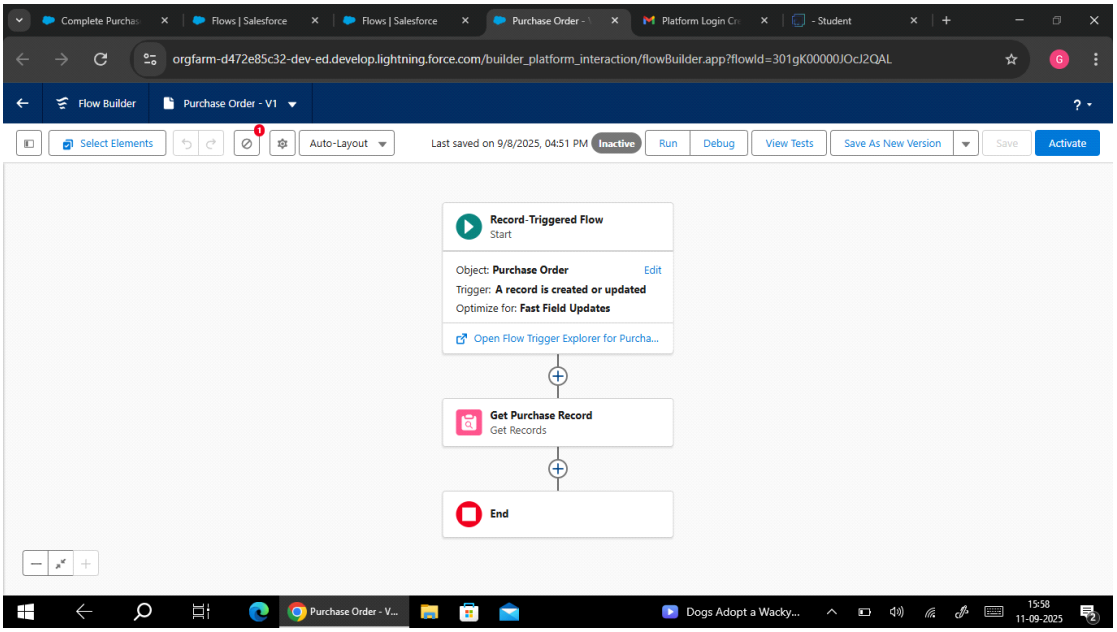
- Developed Lightning app with relevant tabs



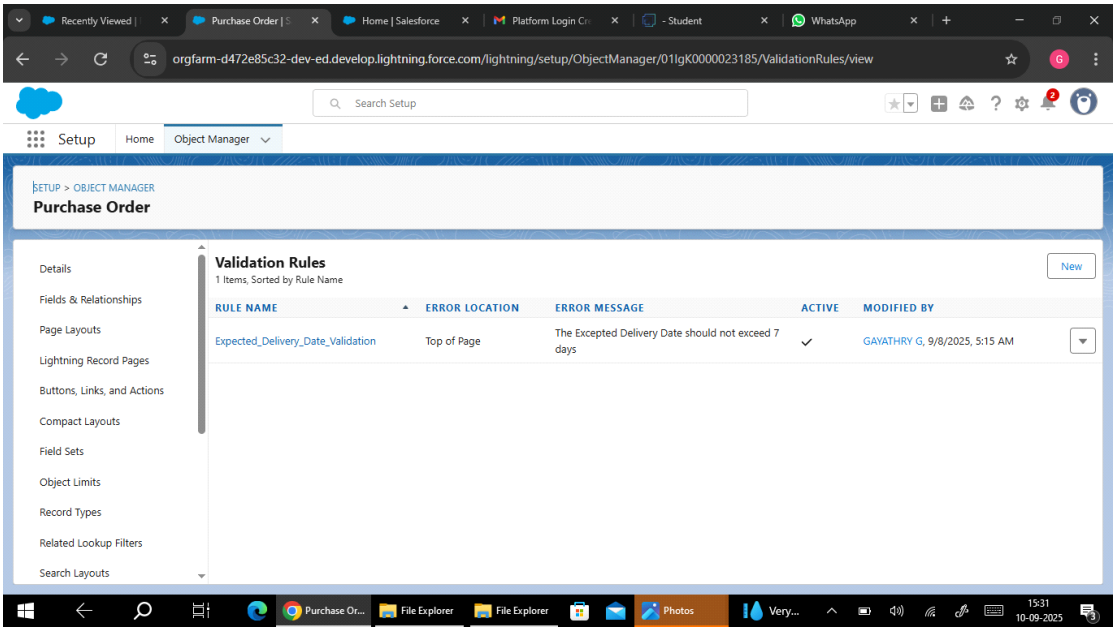


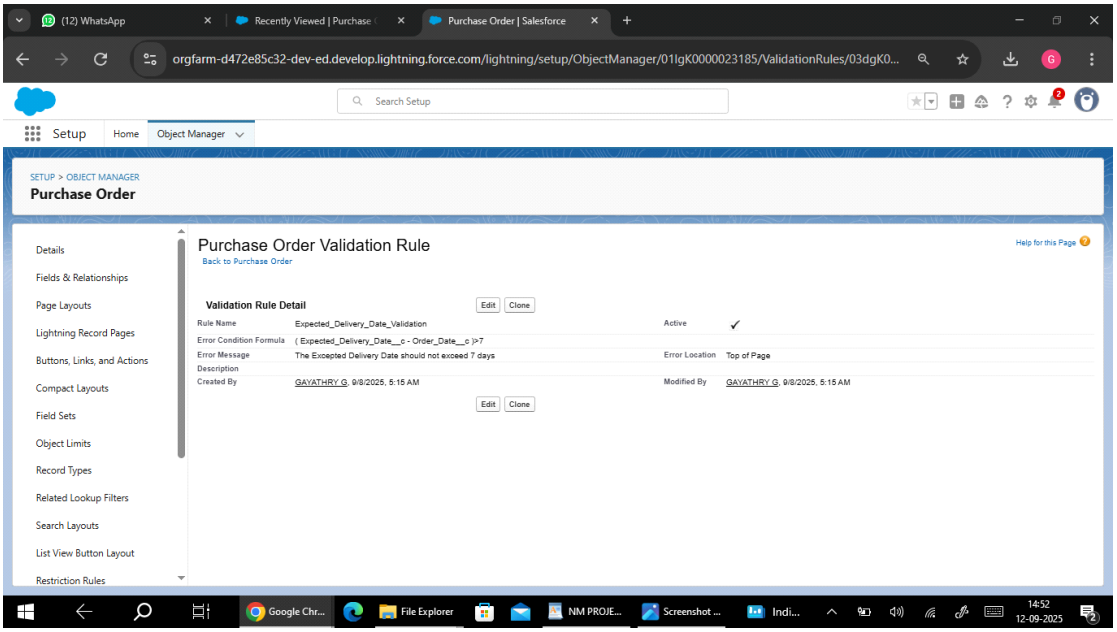


- Implemented Flows for purchase orders and transactions

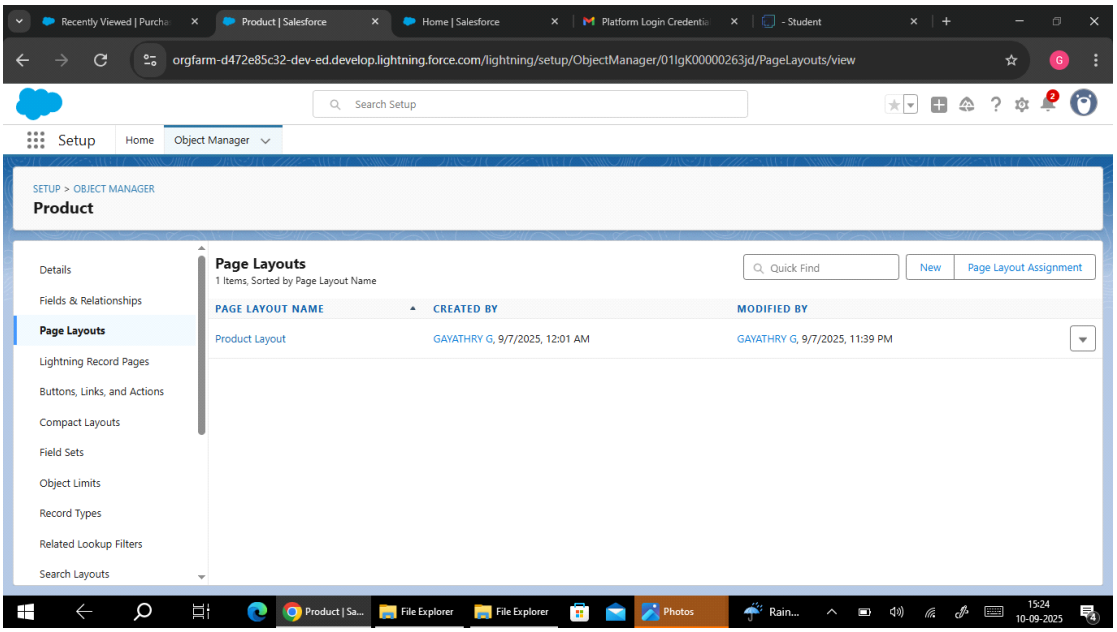


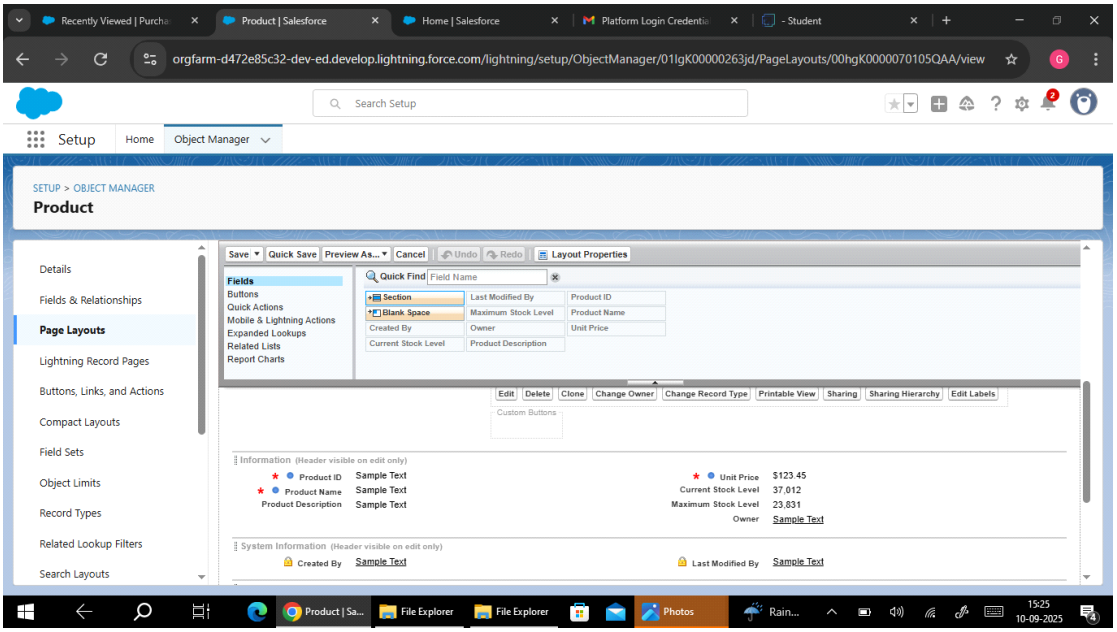
- To create validation rules for inventory object

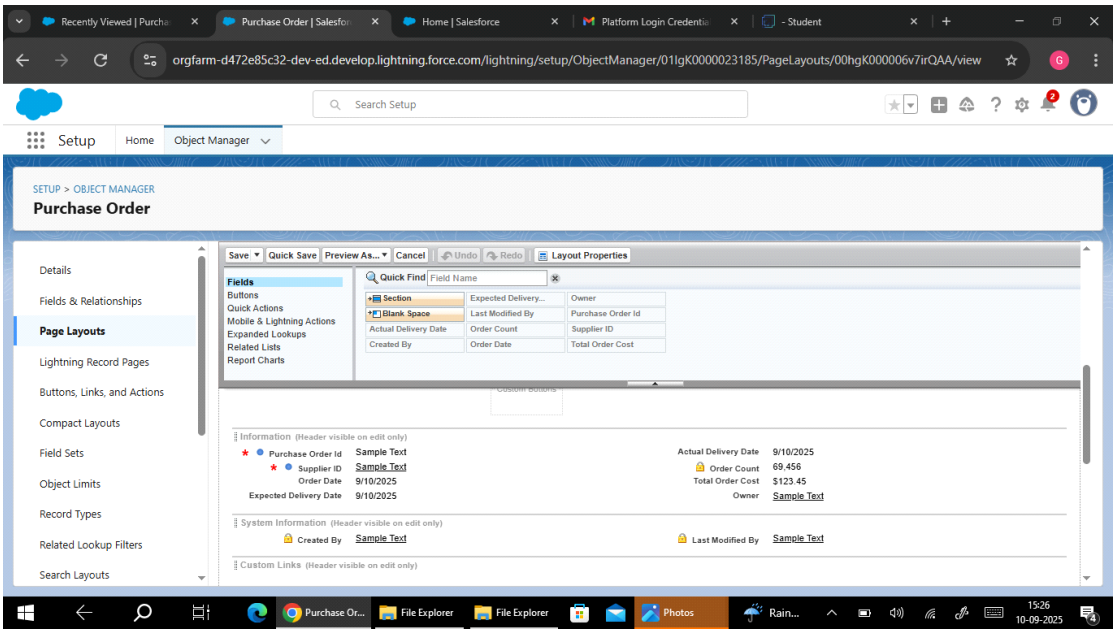




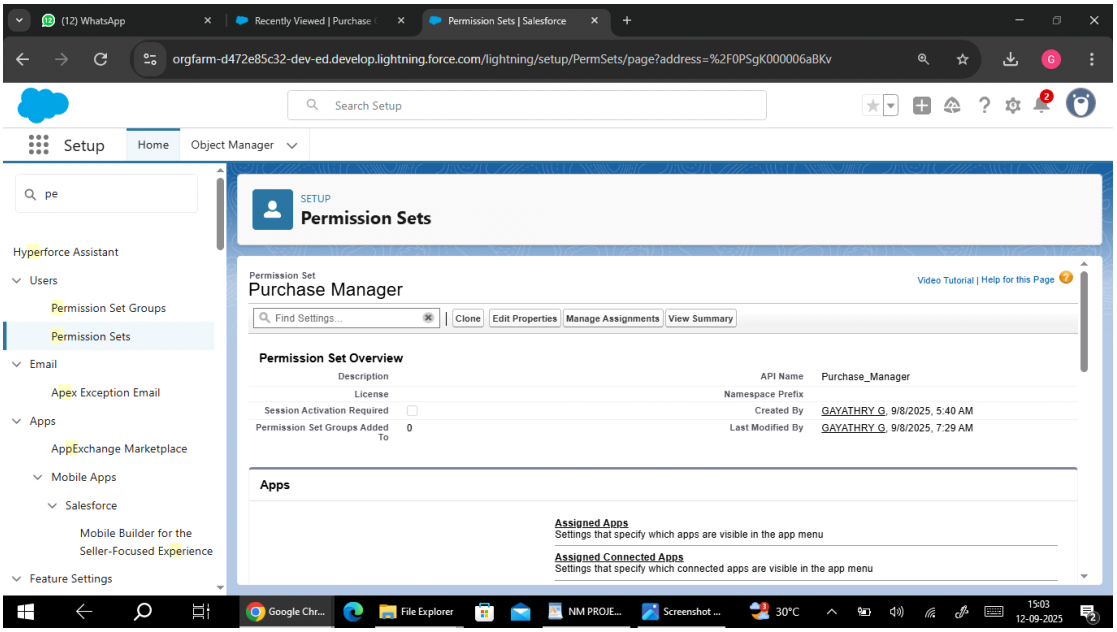
- Implemented page layouts



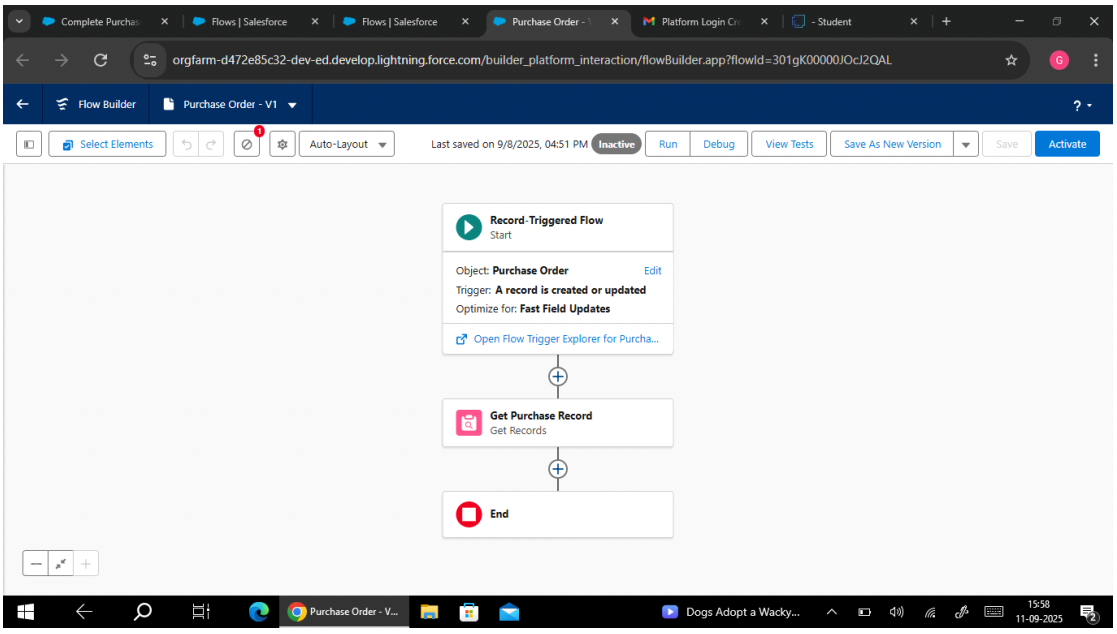


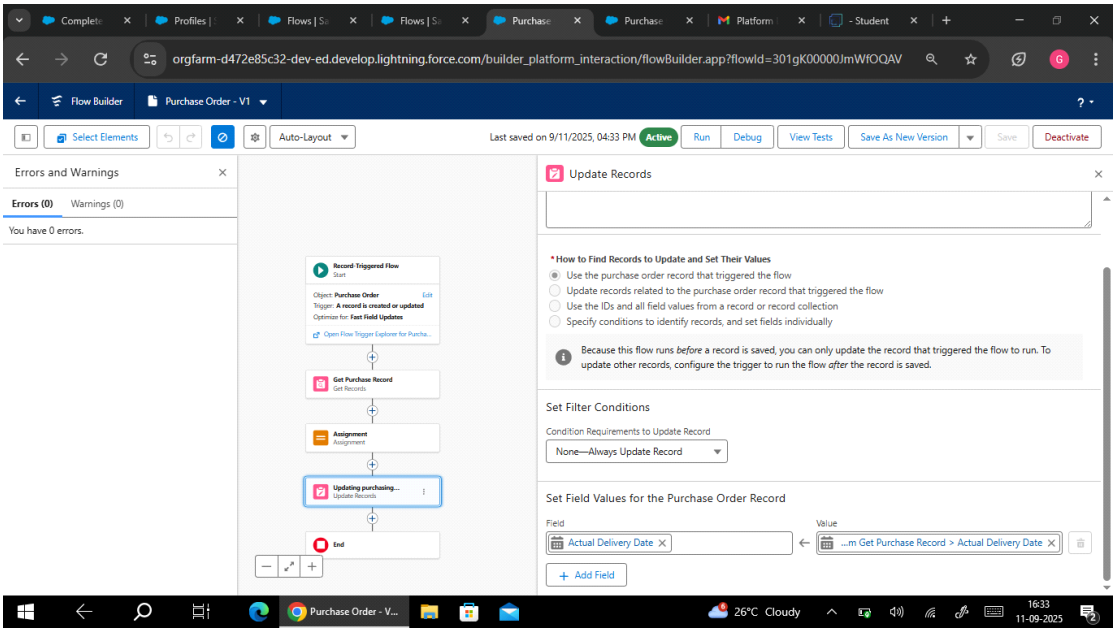


- Set Permissions

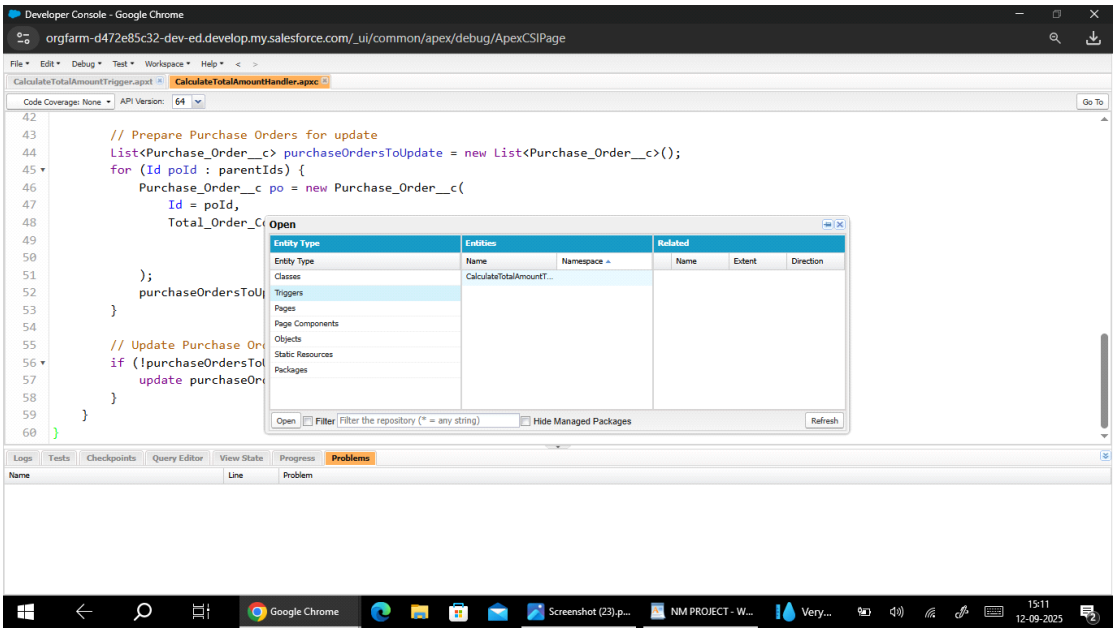

Permission Sets | Salesforce
orgfarm-d472e85c32-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/page?address=%2F0PSgK000006aBKv
Search Setup
Setup
Home
Object Manager
pe
Hyperforce Assistant
Users
Permission Set Groups
Permission Sets
Email
Apex Exception Email
Apps
AppExchange Marketplace
Mobile Apps
Salesforce
Mobile Builder for the Seller-Focused Experience
Feature Settings
SETUP
Permission Sets
Permission Set
Purchase Manager
Video Tutorial | Help for this Page
Find Settings...
Clone
Edit Properties
Manage Assignments
View Summary
Permission Set Overview
Description
License
Session Activation Required
Permission Set Groups Added To
0
API Name
Purchase_Manager
Namespace Prefix
Created By
GAYATHRY G, 9/8/2025, 5:40 AM
Last Modified By
GAYATHRY G, 9/8/2025, 7:29 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
15:03
12-09-2025

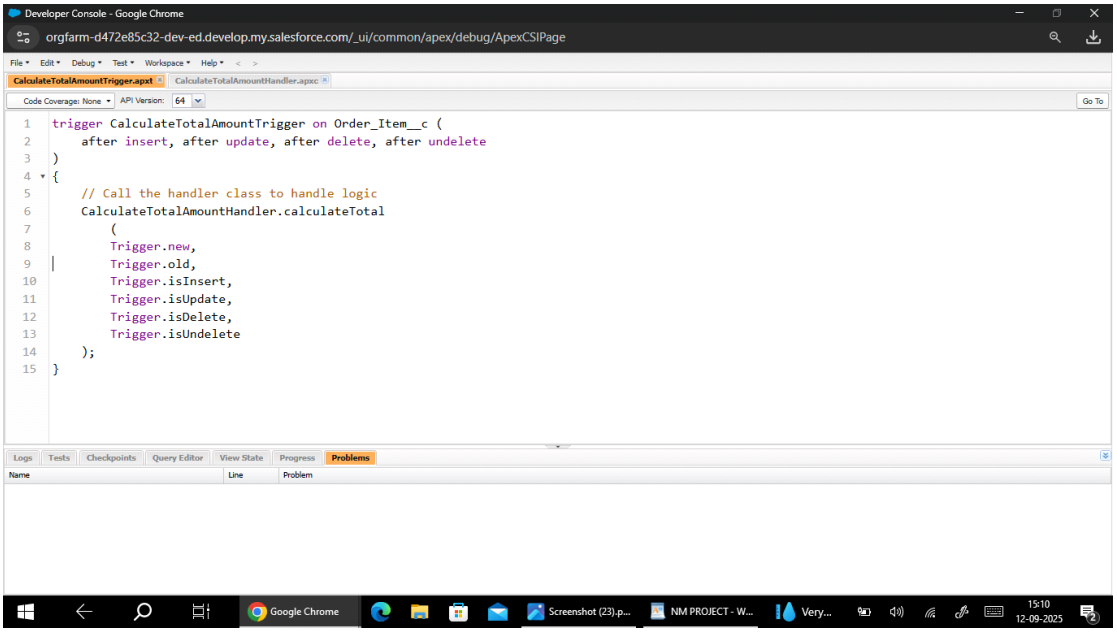
- Flows


orgfarm-d472e85c32-dev-ed.develop.lightning.force.com/builder_platform_interaction/flowBuilder.app?flowId=301gK00000JOcJ2QAL
Flow Builder
Purchase Order - V1
Select Elements
Auto-Layout
Last saved on 9/8/2025, 04:51 PM
Inactive
Run
Debug
View Tests
Save As New Version
Save
Activate
Record-Triggered Flow
Start
Object: Purchase Order
Edit
Trigger: A record is created or updated
Optimize for: Fast Field Updates
Open Flow Trigger Explorer for Purcha...
Get Purchase Record
Get Records
End
15:58
11-09-2025

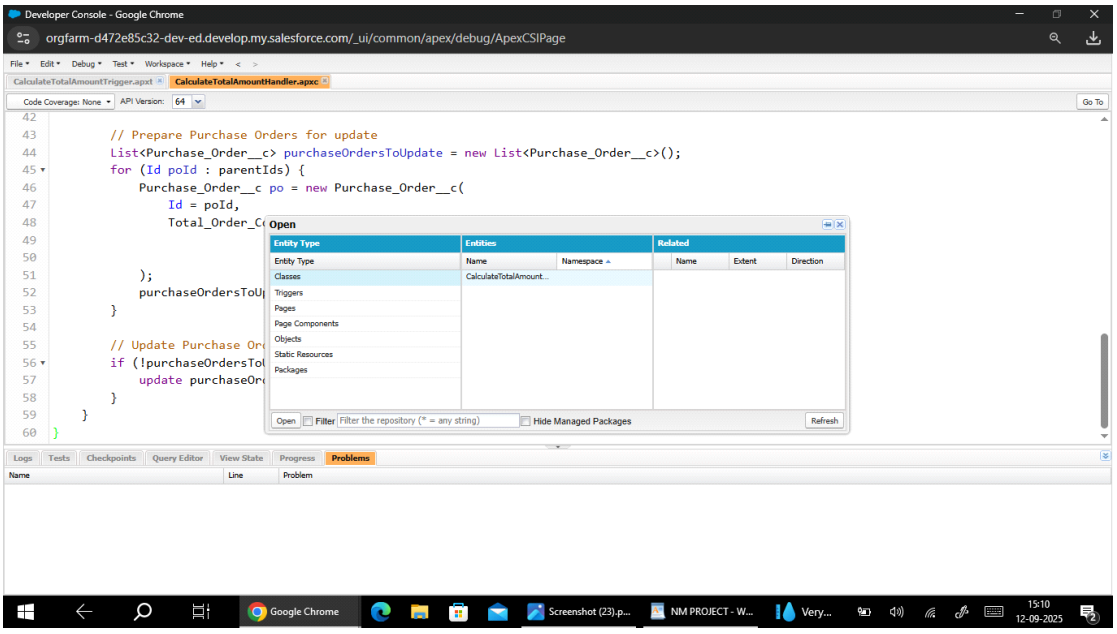


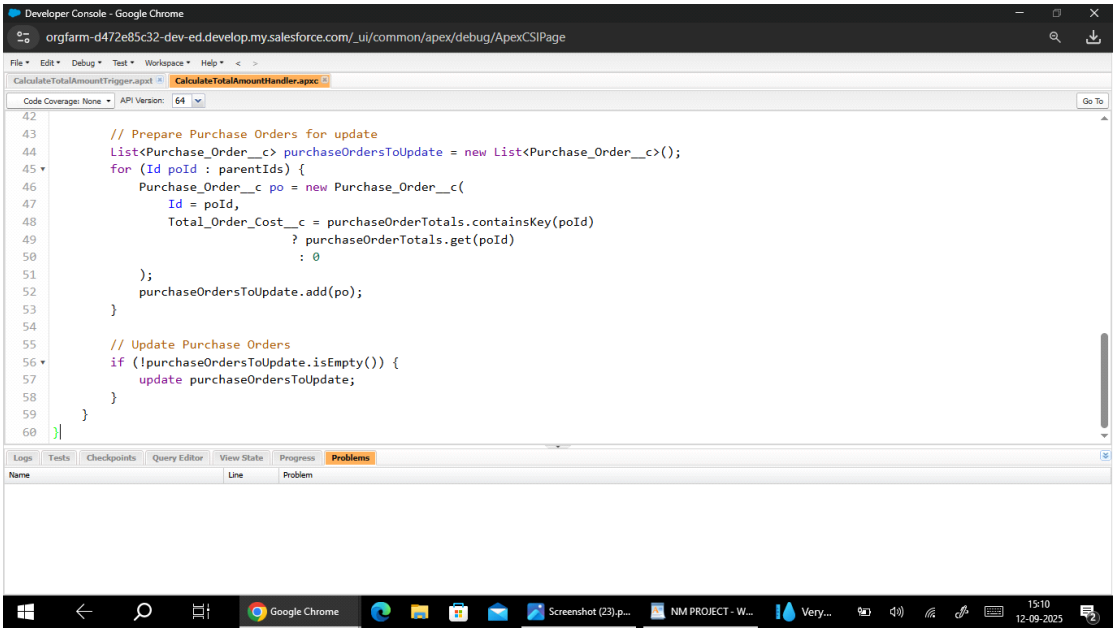
- Apex Triggers




Developer Console - Google Chrome
orgfarm-d472e85c32-dev-ed.develop.my.salesforce.com/_ui/common/apex/debug/ApexCSIPage
CalculateTotalAmountTrigger.apxt
CalculateTotalAmountHandler.apxc
trigger CalculateTotalAmountTrigger on Order_Item__c (
after insert, after update, after delete, after undelete
)
{
// Call the handler class to handle logic
CalculateTotalAmountHandler.calculateTotal
(
Trigger.new,
Trigger.old,
Trigger.isInsert,
Trigger.isUpdate,
Trigger.isDelete,
Trigger.isUndelete
);
}
Logs
Tests
Checkpoints
Query Editor
View State
Progress
Problems
Name
Line
Problem

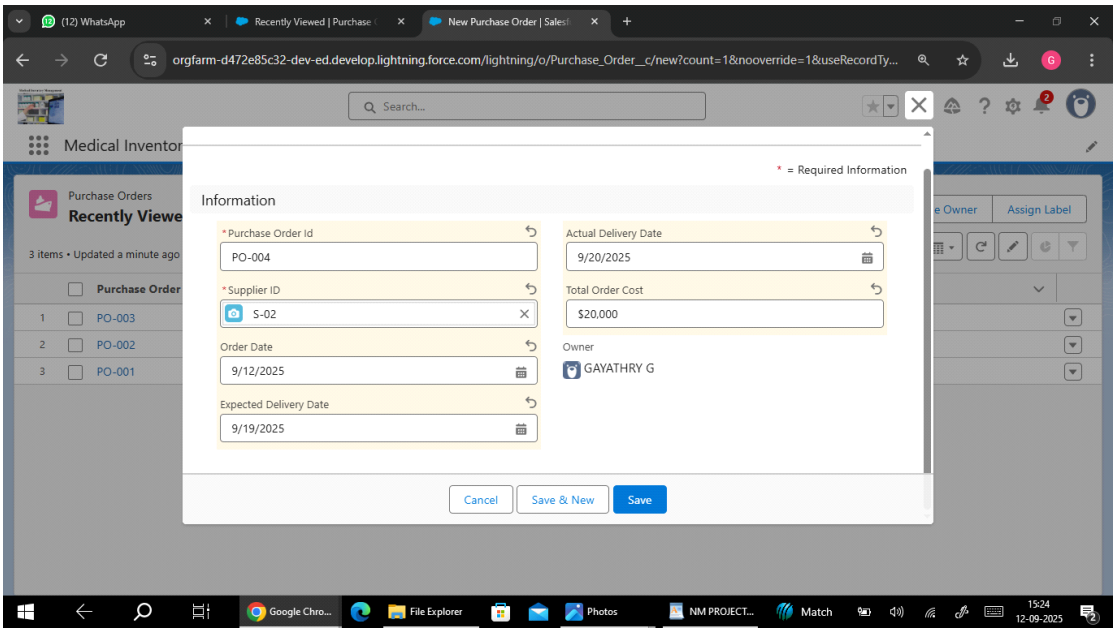
- Apex class

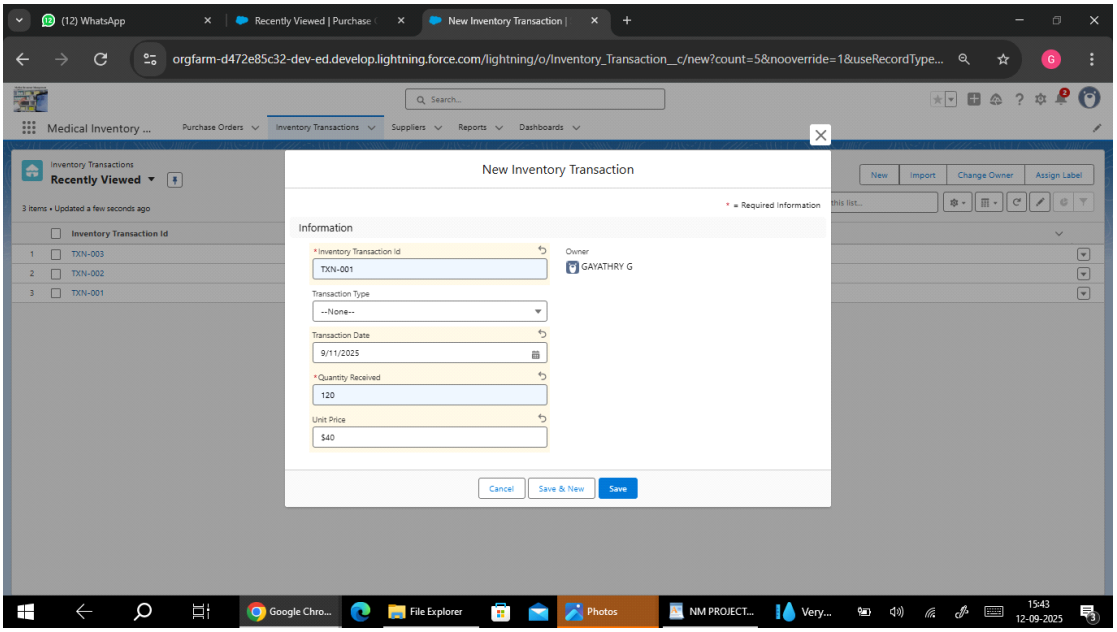

Developer Console - Google Chrome
orgfarm-d472e85c32-dev-ed.develop.my.salesforce.com/_ui/common/apex/debug/ApexCSIPage
CalculateTotalAmountTrigger.apxt
CalculateTotalAmountHandler.apxc
// Prepare Purchase Orders for update
List<Purchase_Order__c> purchaseOrdersToUpdate = new List<Purchase_Order__c>();
for (Id poId : parentIds) {
Purchase_Order__c po = new Purchase_Order__c(
Id = poId,
);
}
// Update Purchase Or
if (!purchaseOrdersTo
update purchaseOr
}
}
Open
Entity Type
Entities
Related
Name
Namespace
Extent
Direction
Classes
Triggers
Pages
Page Components
Objects
Static Resources
Packages
CalculateTotalAmount...
Filter
Filter the repository (* = any string)
Hide Managed Packages
Refresh
Logs
Tests
Checkpoints
Query Editor
View State
Progress
Problems
Name
Line
Problem

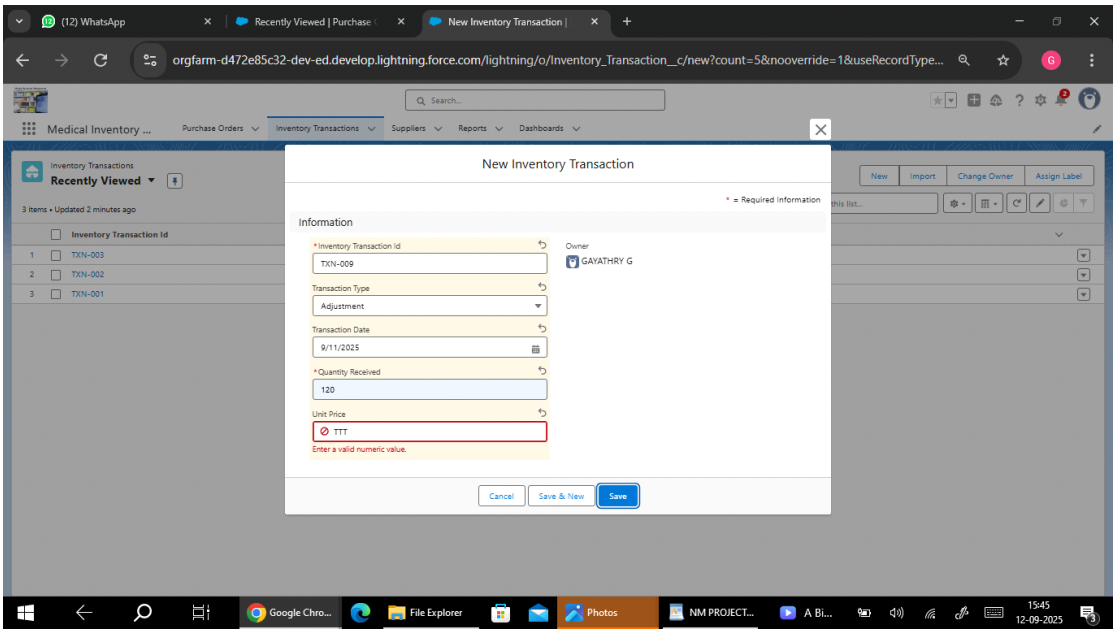


FUNCTIONAL AND PERFORMANCE TESTING

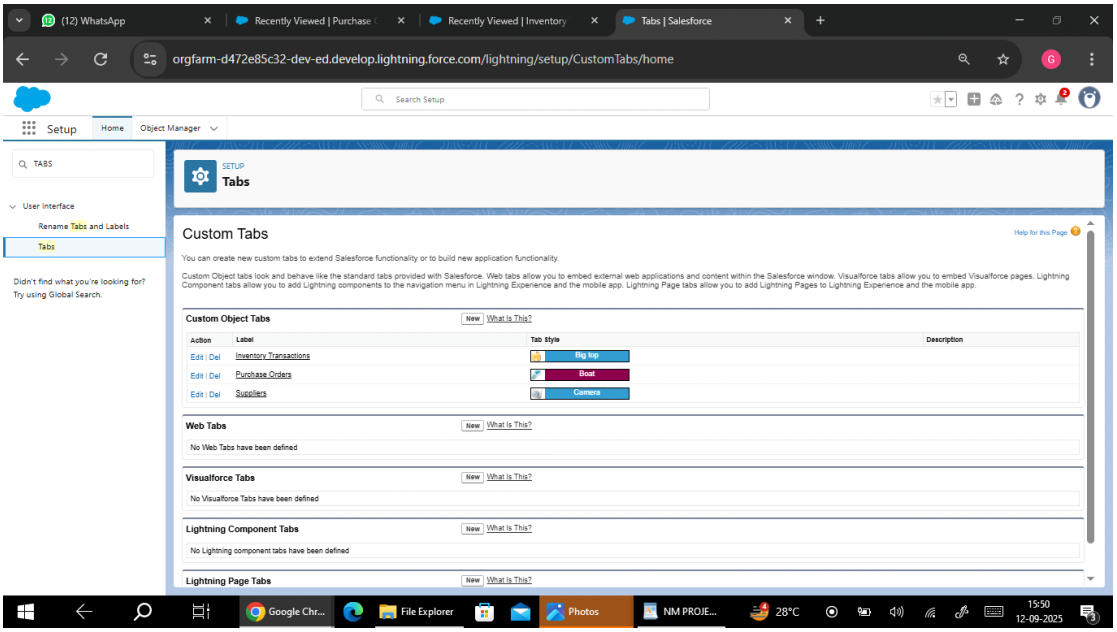
Performance testing:

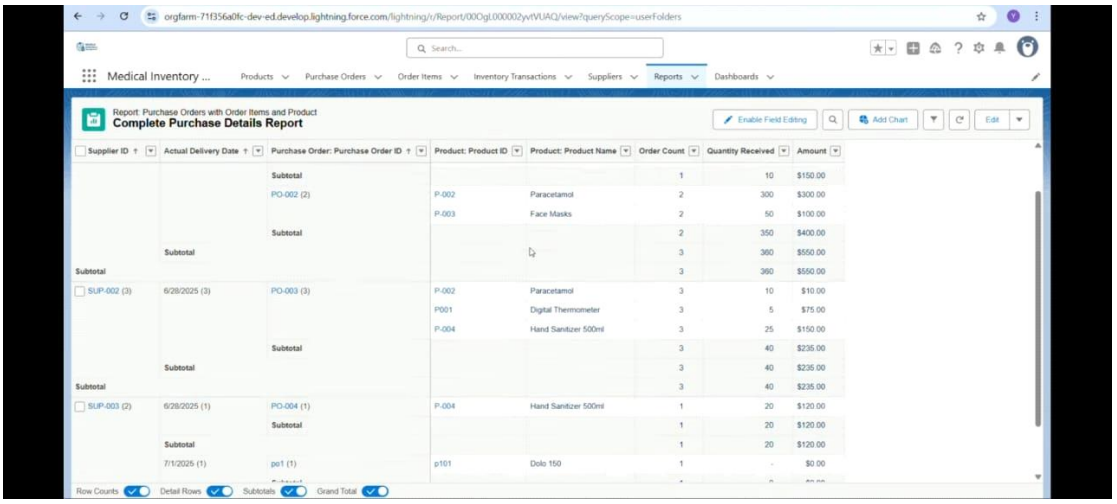



New Inventory Transaction
Information
*Inventory Transaction Id
TXN-001
Owner
GAYATHRY G
Transaction Type
--None--
Transaction Date
9/11/2025
*Quantity Received
120
Unit Price
$40
Cancel
Save & New
Save

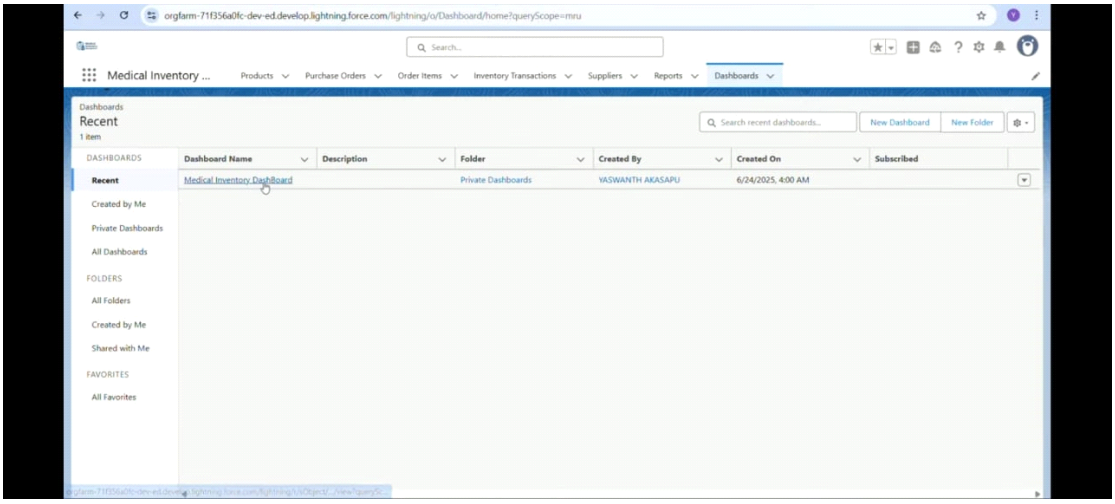

New Inventory Transaction
Information
*Inventory Transaction Id
TXN-009
Owner
GAYATHRY G
Transaction Type
Adjustment
Transaction Date
9/11/2025
*Quantity Received
120
Unit Price
TTT
Enter a valid numeric value.
Cancel
Save & New
Save

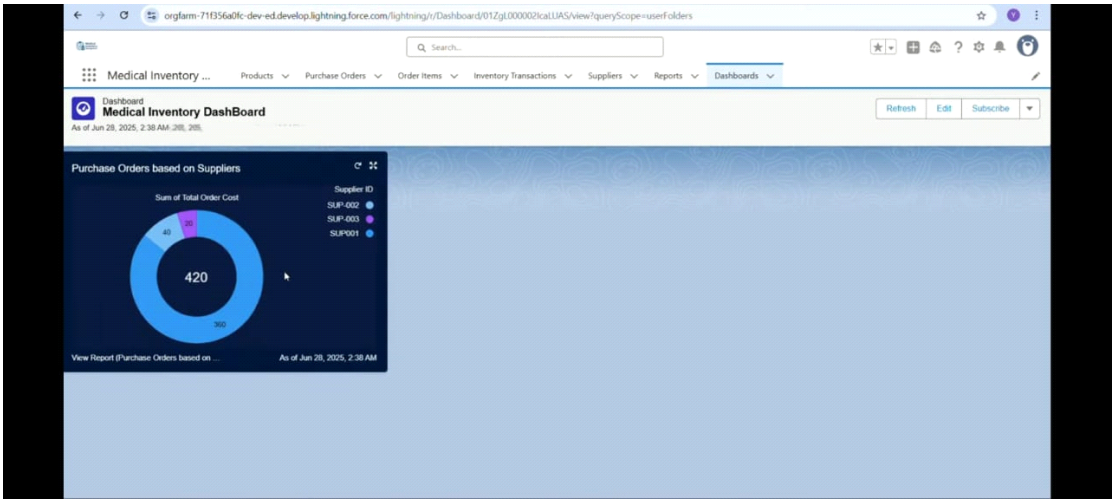
RESULTS


(12) WhatsApp
Recently Viewed | Purchase
Recently Viewed | Inventory
Tabs | Salesforce
orgfarm-d472e85c32-dev-ed.develop.lightning.force.com/lightning/setup/CustomTabs/home
Search Setup
Setup
Home
Object Manager
TABS
User Interface
Rename Tabs and Labels
Tabs
Didn't find what you're looking for?
Try using Global Search.
SETUP
Tabs
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
Big top
Edit | Del
Purchase Orders
Boat
Edit | Del
Suppliers
Camera
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
Lightning Page Tabs
New
What Is This?
Google Chr...
File Explorer
Photos
NM PROJE...
28°C
15:50
12-09-2025


orgfarm-71f356a0fc-dev-ed.develop.lightning.force.com/lightning/r/Report/00OgL000002yvtVUAQ/view?queryScope=userFolders
Search...
Medical Inventory ...
Products
Purchase Orders
Order Items
Inventory Transactions
Suppliers
Reports
Dashboards
Report: Purchase Orders with Order Items and Product
Complete Purchase Details Report
Enable Field Editing
Add Chart
Edit
Supplier ID
Actual Delivery Date
Purchase Order: Purchase Order ID
Product: Product ID
Product: Product Name
Order Count
Quantity Received
Amount
Subtotal
PO-002 (2)
P-002
Paracetamol
P-003
Face Masks
SUP-002 (3)
6/28/2025 (3)
PO-003 (3)
P001
Digital Thermometer
P-004
Hand Sanitizer 500ml
SUP-003 (2)
6/28/2025 (1)
PO-004 (1)
7/1/2025 (1)
po1 (1)
p101
Dolo 150
Row Counts
Detail Rows
Subtotals
Grand Total

Reports





CONCLUSION

The Medical Inventory Management System on Salesforce improves efficiency by automating stock tracking, purchase orders, and reporting. It reduces errors, saves time, and provides real-time visibility of medical supplies, ensuring better management and support for healthcare services.

APPENDIX

Source code:

CalculateTotalAmountTrigger:

```
trigger CalculateTotalAmountTrigger on Order_Item__c (
    after insert, after update, after delete, after undelete
```

```
) {
   // Call the handler class to handle logic
   CalculateTotalAmountHandler.calculateTotal(
      Trigger.new,
      Trigger.old,
      Trigger.isInsert,
      Trigger.isUpdate,
      Trigger.isDelete,
      Trigger.isUndelete
   );
}
```

CalculateTotalAmountHandler:

```
public class CalculateTotalAmountHandler {
   public static void calculateTotal(
      List<Order_Item__c> newList,
      List<Order_Item__c> oldList,
      Boolean isInsert,
      Boolean isUpdate,
      Boolean isDelete,
      Boolean isUndelete
   ) {
      // Collect parent Purchase Order Ids
      Set<Id> parentIds = new Set<Id>();
      if (newList != null) {
         for (Order_Item__c oi : newList) {
            if (oi.Purchase_Order__c != null) {
               parentIds.add(oi.Purchase_Order__c);
            }
         }
      }
      if (oldList != null) {
         for (Order_Item__c oi : oldList) {
            if (oi.Purchase_Order__c != null) {
               parentIds.add(oi.Purchase_Order__c);
            }
         }
      }

      if (parentIds.isEmpty()) return;

      // Aggregate the totals
      Map<Id, Decimal> purchaseOrderTotals = new Map<Id, Decimal>();
      for (AggregateResult aggr : [
```

```
        SELECT Purchase_Order_c purchaseOrderId, SUM(Amount_c) totalAmount
        FROM Order_Item__c
        WHERE Purchase_Order__c IN :parentIds
        GROUP BY Purchase_Order__c
      ]) {
        purchaseOrderTotals.put(
          (Id) aggr.get('purchaseOrderId'),
          (Decimal) aggr.get('totalAmount')
        );
      }

      // Prepare Purchase Orders for update
      List<Purchase_Order_c> purchaseOrdersToUpdate = new List<Purchase_Order_c>();
      for (Id poId : parentIds) {
        Purchase_Order_c po = new Purchase_Order_c(
          Id = poId,
          Total_Order_Cost__c = purchaseOrderTotals.containsKey(poId)
                    ? purchaseOrderTotals.get(poId)
                    : 0
        );
        purchaseOrdersToUpdate.add(po);
      }

      // Update Purchase Orders
      if (!purchaseOrdersToUpdate.isEmpty()) {
        update purchaseOrdersToUpdate;
      }
    }
}public class CalculateTotalAmountHandler {
    public static void calculateTotal(
      List<Order_Item__c> newList,
      List<Order_Item__c> oldList,
      Boolean isInsert,
      Boolean isUpdate,
      Boolean isDelete,
      Boolean isUndelete
    ) {
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            parentIds.add(oi.Purchase_Order__c);
          }
        }
      }
```

```
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        for (Order_Item__c oi : oldList) {
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            }
        }
    }

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        FROM Order_Item__c
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        GROUP BY Purchase_Order__c
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        purchaseOrderTotals.put(
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            (Decimal) aggr.get('totalAmount')
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    }

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        update purchaseOrdersToUpdate;
    }
  }
}
```