

PROJECT TITLE:

Medical Inventory Management

College Name:

Nandha Arts And Science College

College Code:

bru4j

TEAM MEMBERS:

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Medical Inventory Management Project Documentation

1. Project Overview

The **Medical Inventory Management System** is a Salesforce application designed to streamline the process of managing medical inventory. It helps track suppliers, products, purchase orders, order items, and inventory transactions in a single platform.

This system improves:

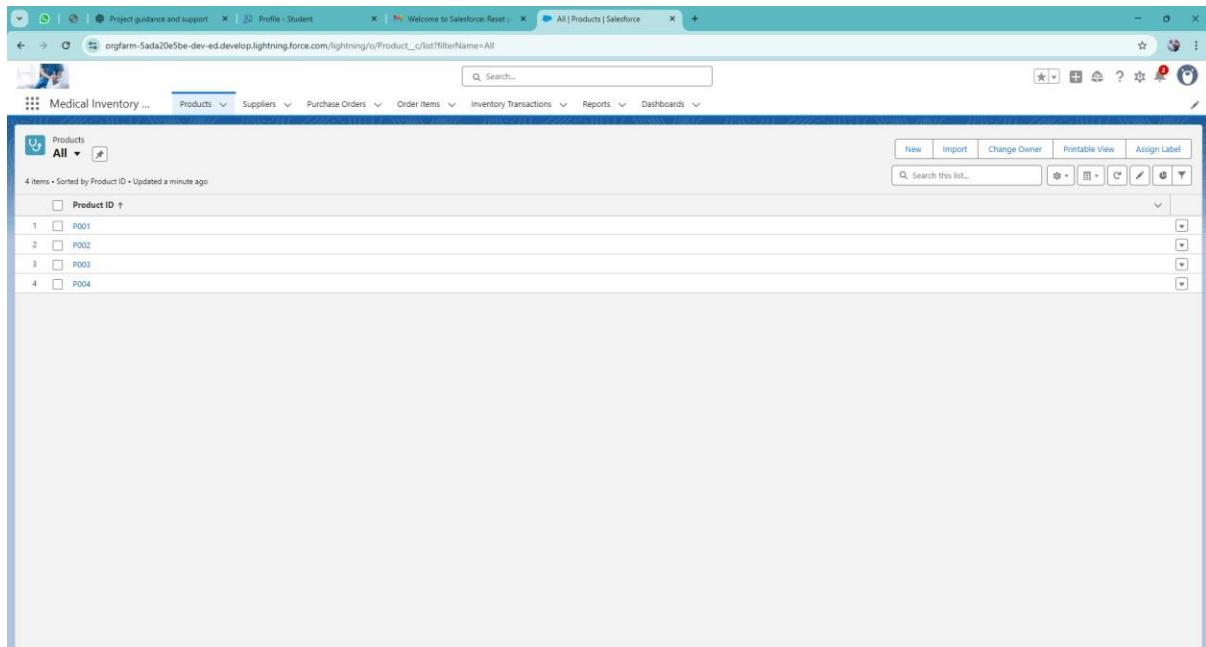
- Supplier tracking
- Stock level monitoring
- Order management
- Expiry date tracking
- Report generation and analytics

2. Objectives

The main objectives of this project are:

1. To efficiently manage and track **medical products** and their **stock levels**.
2. To streamline the **purchase order process** by linking suppliers and products.
3. To ensure **real-time monitoring** of stock and expiry dates.
4. To generate **insightful reports and dashboards** for decision-making.
5. To automate repetitive tasks using Salesforce tools like **flows and validation rules**.

Medical Inventory Management App.



3. Created a developer org in salesforce.

1. Go to <https://developer.salesforce.com/signup>
2. On the sign up form, enter the following details :

A screenshot of a web browser showing the "Sign up for your Developer Edition" form on the Salesforce website. The form fields are as follows:

First name	Last name
VISHAL	KUMAR R
Job title	Work email
Student	vishalk2922@gmail.com
Company	Country/Region
Nandha Arts And Sci	India

Below the form, there is a note: "Your org may be provisioned on or migrated to Hyperforce, Salesforce's public cloud infrastructure." There is also a checked checkbox for the "I agree to the Main Services Agreement – Developer Services and Salesforce Program Agreement." At the bottom, there is a "Privacy Statement" link and a reCAPTCHA verification step.

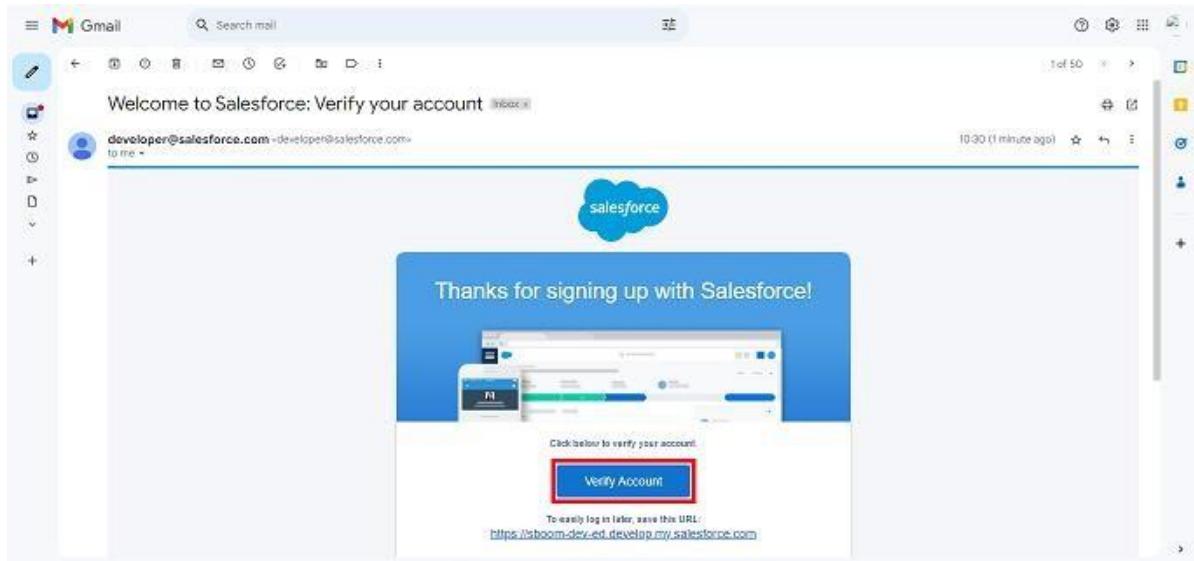
1. First name & Last name
2. Email

3. Role : Developer
4. Company : College Name
5. County : India
6. Postal Code : pin code

Click on sign me up after filling these.

4. Account Activation

1. Go to the inbox of the email that you used while signing up. Click on the verify account to activate your account. The email may take 5-10mins.



2. Click on Verify Account
3. Give a password and answer a security question and click on change password.

Change Your Password

Enter a new password for lead@sb.oom.
Make sure to include at least:

- 8 characters
- 1 letter
- 1 number

* New Password
..... Good

* Confirm New Password
..... Match

Security Question
In what city were you born?

* Answer
asdfghjkl

Change Password

4. Then you will redirect to your salesforce setup page.

SETUP Home

Get Started with Einstein Bots

Launch an AI-powered bot to automate your digital connections.

Mobile Publisher

Use the Mobile Publisher to create your own branded mobile app.

Real-time Collaborative Docs

Transform productivity with collaborative docs, spreadsheets, and slides inside Salesforce.

5. Objects Created

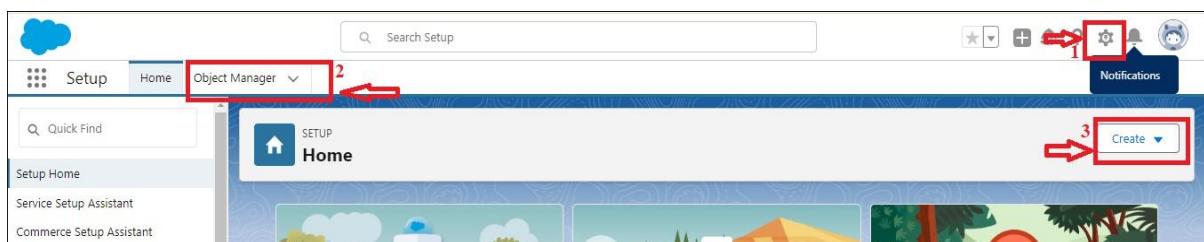
The following **custom objects** were created to manage the system:

Object Name	Purpose
Supplier	To store supplier details like name, contact person, phone, and address.

Object Name	Purpose
Product	To store product information like unit price, current stock level, and minimum stock level.
Purchase Order	To record order details from suppliers.
Order Item	To link products with each purchase order and track quantities and costs.
Inventory Transaction	To track stock movement (Inbound/Outbound).
In Salesforce, objects are database tables that allow you to store data specific to your organization.	

To create an object:

1. From the setup page
2. Click on Object Manager
3. Click on Create >> Click on Custom Object.
4. Enter the label name as Product
5. Enter Plural label name as Products
6. Enter Record Name as Product ID
7. Select Data Type as Text.
8. Select Allow reports.
9. Select Allow search.
10. Click on Save and New



The screenshot shows the 'New Custom Object' page in the Salesforce Setup. The steps are numbered 1 through 10:

- Label: Product
- Plural Label: Products
- Starts with vowel sound:
- Record Name: Product ID
- Data Type: Text
- Allow Reports:
- Allow Activities:
- Track Field History:
- Allow in Chatter Groups:
- Enable Licensing:
- In Development: Deployed:
- Allow Search:
- Add Notes and Attachments related list to default page layout:
- Launch New Custom Tab Wizard after saving this custom object:

Buttons at the bottom: Save, Save & New, Cancel.

In the same way Created Purchase Order, Order Item, Inventory Transaction and Supplier objects.

6. Tabs Created

In Salesforce, tabs are used to make the data stored in objects accessible to users through the user interface. Tabs are a fundamental part of the Salesforce interface, providing a way to navigate to different objects and records.

1. Go to the setup page >> type Tabs in Quick Find bar
2. Click on tabs
3. Click on New (under custom object tab).

4. Select Object(Product) >> Select the tab style
5. Click on Next >> (Add to profiles page) keep it as default >> Click on Next (Add to Custom App) uncheck the include tab .
6. Make sure that the Append tab to user's existing personal customizations is checked.
7. Click save

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	New What Is This?
No Custom Object Tabs have been defined	

Web Tabs	New What Is This?
No Web Tabs have been defined	

Visualforce Tabs	New What Is This?
No Visualforce Tabs have been defined	

Activate Windows

Step 1. Enter the Details

Step 1 of 3

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

Object	Product
Tab Style	Stethoscope

(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

- Now created the Tabs for the remaining Objects, they are “Purchase Order, Order Item, Inventory Transaction, Supplier”.
- Followed the same steps as mentioned in above.

Action	Label	Tab Style	Description
Edit Del	Inventory Transactions		
Edit Del	Order Items		
Edit Del	Products		
Edit Del	Purchase Orders		
Edit Del	Suppliers		

Web Tabs
No Web Tabs have been defined

Visualforce Tabs
No Visualforce Tabs have been defined

Lightning Component Tabs
No Lightning component tabs have been defined

Lightning Page Tabs
No Lightning Page Tabs have been defined

7. Created a Lightning App for Medical Inventory Management

- From Setup, enter App Manager in the Quick Find and select App Manager.
- Click New Lightning App.
- Enter Medical Inventory Management as the App Name >> Click on upload image and add an image related to Medical Inventory then click next
- Under App Options, leave the default selections and click next.
- Under Utility Items, leave as is and click Next.
- From Available Items, select Products, Purchase Orders, Order Items, Inventory Transactions, Suppliers, Reports, and Dashboards and move them to Selected Item and Click Next.
- From Available Profiles, select System Administrator and move it to Selected Profiles.
- Click Save & Finish.

Setup Home Object Manager

Lightning Experience App Manager

New Lightning App New Connected App

App Name ↑ Developer Name ↓ Description Last Modified ... App Type Vi... ▾

New Lightning App

App Details

*App Name Medical Inventory Management

*Developer Name Medical_Inventory_Management

Description Enter a description...

App Branding

Image 3 Clear

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

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

Selected Items

- Products
- Purchase Orders
- Order Items
- Inventory Transactions
- Suppliers
- Reports

New Lightning App

User Profiles

Choose the user profiles that can access this app.

Available Profiles

system

System Administrator

Selected Profiles

Back Save & Finish

7

8

8. Created a Text Field in Product Object

1. Click the gear icon and select Setup. This launches Setup in a new tab.
2. Click the Object Manager tab next to Home.
3. Select Product custom object.
4. Select Fields & Relationships from the left navigation
5. Click on New
6. Select Text field, click Next
7. Enter Field Label as “Product Name” and Length 255.
8. Select Required Field.
9. Click Next, Next, then Save & New.

The screenshots illustrate the steps to create a text field in the Product object:

Object Manager Screenshot:

- 1. Gear icon (Setup) selected.
- 2. Object Manager tab selected.
- 3. Product custom object selected.

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Fulfillment Order Product	FulfillmentOrderLineItem	Standard Object			
Opportunity Product	OpportunityLineItem	Standard Object			
Order Product	OrderItem	Standard Object			
Product	Product_c	Custom Object		18/06/2024	✓
Product	Product2	Standard Object			
Product Attribute	ProductAttribute	Standard Object			

Fields & Relationships Screenshot:

- 4. Fields & Relationships selected.
- 5. New button clicked to create a new field.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)	✓	
Product ID	Name	Text(50)	✓	

clicking Send an Email. Note that custom email addresses cannot be used for mass emails.

- Geolocation
- Number
- Percent
- Phone
- Picklist
- Picklist (Multi-Select)
- Text 6
- Text Area
- Text Area (Long)
- Text Area (Rich)
- Text (Encrypted) 7
- Time
- URL

Allows users to define locations. Includes latitude and longitude components, and can be used to calculate distance.

Allows users to enter any number. Leading zeros are removed.

Allows users to enter a percentage number, for example, '10' and automatically adds the percent sign to the number.

Allows users to enter any phone number. Automatically formats it as a phone number.

Allows users to select a value from a list you define.

Allows users to select multiple values from a list you define.

Allows users to enter any combination of letters and numbers.

Allows users to enter up to 255 characters on separate lines.

Allows users to enter up to 131,072 characters on separate lines.

Allows users to enter formatted text, add images and links. Up to 131,072 characters on separate lines.

Allows users to enter any combination of letters and numbers and store them in encrypted form.

Allows users to enter a local time. For example, "2:40 PM", "14:40", "14:40:00", and "14:40:50:600" are all valid times for this field.

Allows users to enter any valid website address. When users click on the field, the URL will open in a separate browser window.

Next Cancel

Step 2. Enter the details Step 2 of 4

Field Label Product Name 8 9

Please enter the maximum length for a text field below.

Length 255 7

Field Name Product 7

Description

Help Text

Required Always require a value in this field in order to save a record 8

Unique Do not allow duplicate values

Treat "ABC" and "abc" as duplicate values (case insensitive)
 Treat "ABC" and "abc" as different values (case sensitive)

External ID Set this field as the unique record identifier from an external system

Auto add to custom report type Add this field to existing custom report types that contain this entity 8

Field Added in Object:

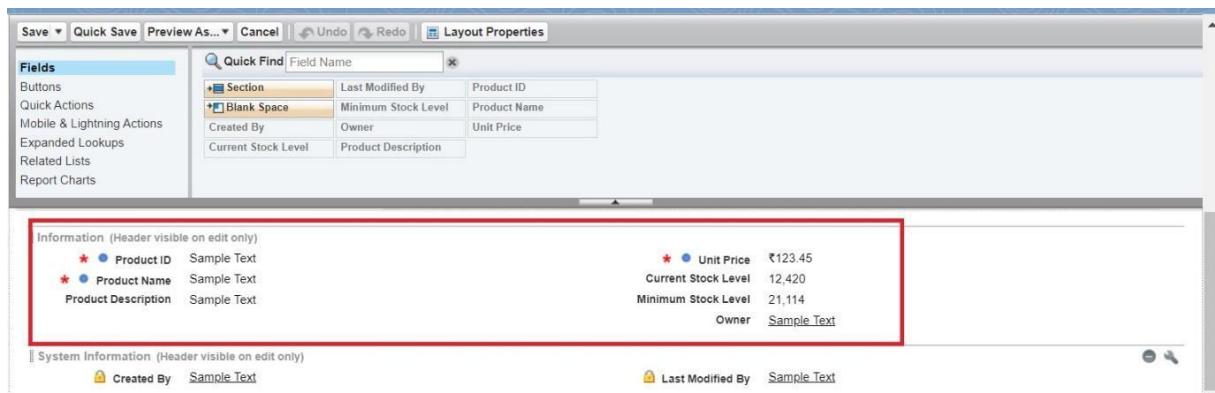
Object	Field Name	Data Type
Product	Product ID(Standard)	Text
	Product Name	Text
	Product Description	Text Area
	Minimum Stock Level	Number(18, 0)
	Current Stock Level	Number(18, 0)
	Unit Price	Currency(16, 2)
	Expiry Date	Date

Purchase Order	Purchase Order ID(Standard)	Text
	Supplier ID	Lookup(Supplier)
	Order Date	Date
	Expected Delivery Date	Date
	Actual Delivery Date	Date
	Order Count	Roll-Up Summary (COUNT Order Item)
	Total Order Cost	Currency(16, 2)
Order Item	Order Item ID(Standard)	Text
	Product ID	Lookup(Product)
	Purchase Order ID	Master-Detail(Purchase Order)
	Quantity Ordered	Number(18, 0)
	Quantity Received	Number(18, 0)
	Unit Price	Formula(Currency)
	Amount	Formula(Currency)
Inventory Transaction	Transaction ID(Standard)	Text
	Purchase Order ID	Lookup(Purchase Order)
	Transaction Date	Date
	Transaction Type	Picklist
	Total Order Cost	Formula(Currency)
Supplier	Supplier ID(Standard)	Text

	Supplier Name	Text
	Contact Person	Text
	Phone Number	Phone
	Email	Email
	Address	TextArea

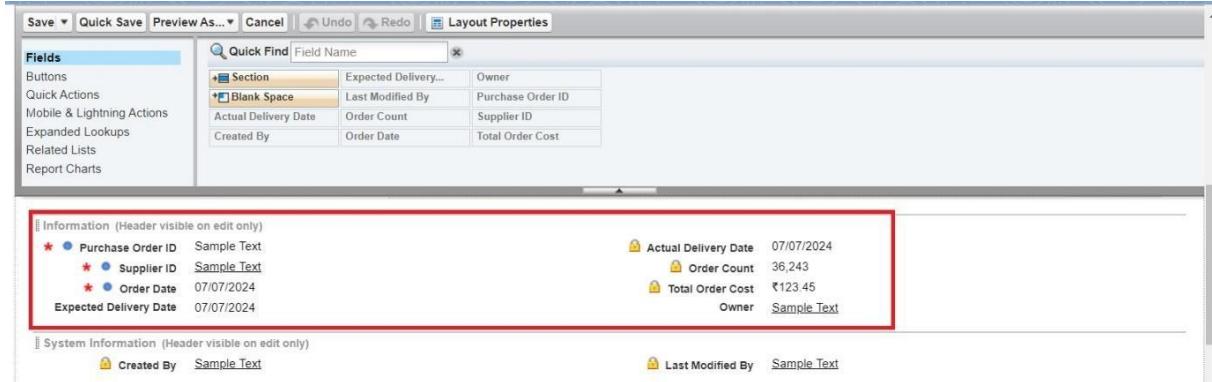
9. Edited a Page Layout in Product Object

1. Go to setup >> click on Object Manager >> type object name(Product) in quick find box >> click on the Product object >> Page Layouts .
2. Click on the Product Layout.
3. Drag and Arrange the field as shown below.

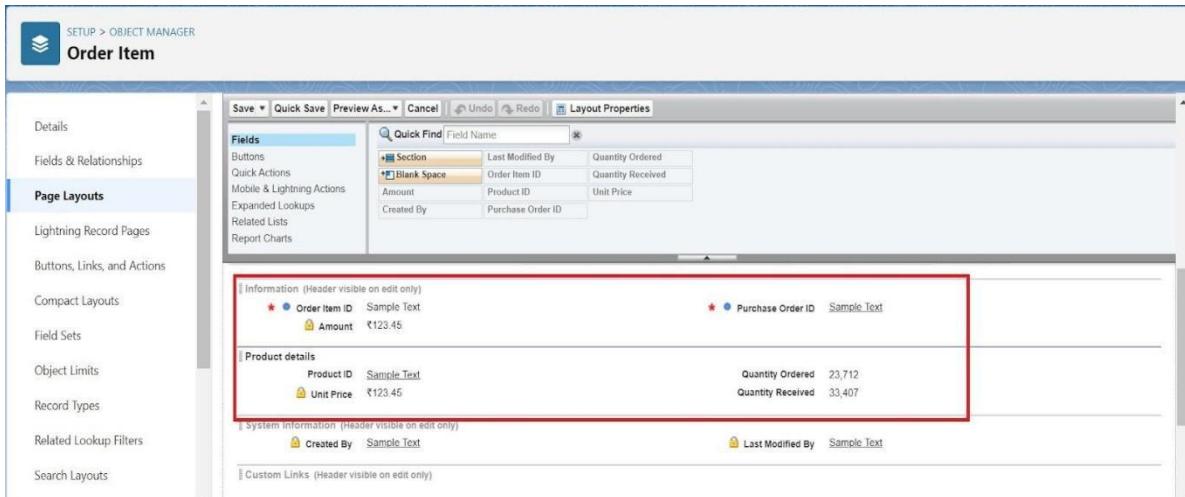


4. Click on Save.

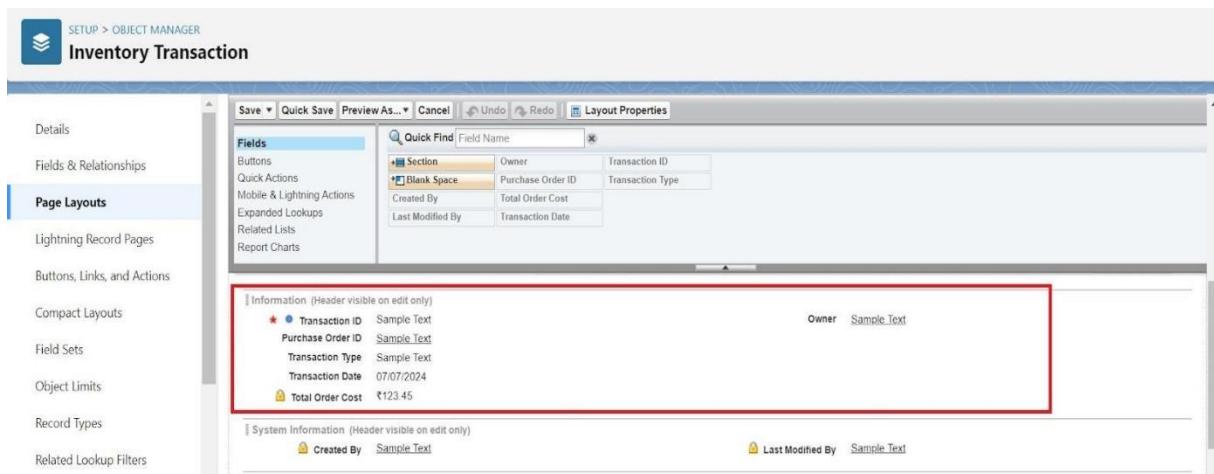
9.1 Edited a Page Layout in Purchase Order Object



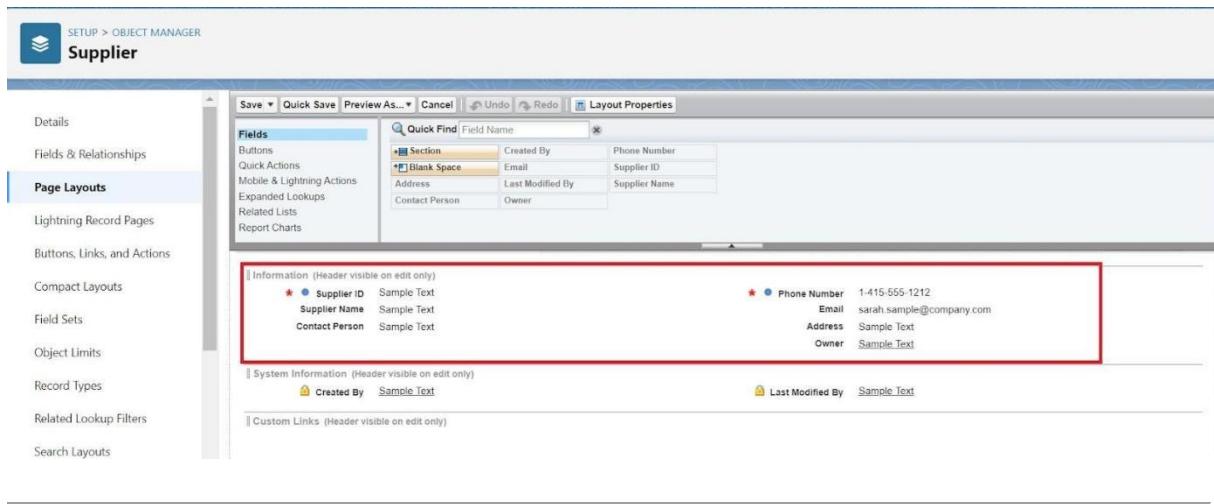
9.2 Edited a Page Layout in Order Item Object



9.3 Edited a Page Layout in Inventory Transaction Object



9.4 Edited a Page Layout in Supplier Object



10. Created a Compact Layout to a Product Object

1. Go to setup >> click on Object Manager >> type object name(Product) in quick find box >> click on the Product object
2. Click on Compact Layouts in the sidebar .
3. Click on New.

4. Enter the Label as “Product Compact Layout”.
5. Select the Compact Layout Fields : Select Product name, Unit Price, Current Stock Level.
6. Click Save.
7. Click Compact Layout Assignment.
8. Click Edit Assignment.
9. Choose "Product Compact Layout" from the dropdown.
10. Click Save.

The screenshot shows the Salesforce Object Manager for the 'Product' object. The left sidebar has a 'Compact Layouts' section highlighted with a red box labeled '2'. The main area shows a table for 'Compact Layouts' with one item: 'System Default' (API Name: SYSTEM). A 'New' button is visible at the top right. The 'Enter Compact Layout Information' step is shown, with the 'Label' field set to 'Product Compact Layout' (highlighted with a red box labeled '4') and the 'Name' field set to 'Product_Compact_Layout'. The 'Select Compact Layout Fields' step shows fields like 'Created By', 'Last Modified By', etc., being moved from the 'Available Fields' list to the 'Selected Fields' list (highlighted with a red box labeled '5'). The 'Save' button is at the bottom (highlighted with a red box labeled '6').

The screenshot shows the 'Compact Layout Assignment' screen for the 'Product' object. It asks to select a primary compact layout. The 'Primary Compact Layout' dropdown is set to 'Product Compact Layout' (highlighted with a red box labeled '9'). The 'Save' button is at the bottom (highlighted with a red box labeled '10').

10.1 Created a Compact Layout to a Purchase Order Object

The screenshot shows the 'Compact Layout Edit' interface. In the 'Enter Compact Layout Information' section, the 'Label' field is set to 'Purchase Order Compact L' (marked with red box 4) and the 'Name' field is set to 'Purchase_Order_Compact' (marked with red box 4). In the 'Select Compact Layout Fields' section, the 'Available Fields' list includes 'Actual Delivery Date', 'Created By', 'Expected Delivery Date', 'Last Modified By', 'Owner', and 'Order Count'. The 'Selected Fields' list contains 'Purchase Order ID', 'Order Date', 'Total Order Cost', and 'Supplier ID'. To the right of the selected fields is a vertical arrangement of buttons labeled 'Top', 'Up', 'Down', and 'Bottom' with accompanying arrows. A note at the bottom states: 'Use SHIFT + click to select adjacent fields. Use CTRL + click to select an assortment of fields.' At the bottom of the screen are 'Save' and 'Cancel' buttons, with 'Save' highlighted with a red box (marked with red box 6).

Purchase Order Compact Layouts Compact Layout Assignment

The screenshot shows the 'Compact Layout Assignment' screen. It displays a list titled 'Primary Compact Layout' with one item: 'Purchase Order Compact Layout' (marked with red box 9). Below this list are 'Save' and 'Cancel' buttons, with 'Save' highlighted with a red box (marked with red box 10).

11. Create an Expected Delivery Date Validation rule to a Purchase Order Object

1. Go to setup >> click on Object Manager >> type object name(Purchase Order) in quick find box>> click on the Purchase Order object
2. Click on the validation rule >> click on New.
3. Enter the Rule name as “Expected Delivery Date Validation”.
4. Select Active
5. Insert the Error Condition Formula as :
(Expected_Delivery_Date__c - Order_Date__c)> 7

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 3

Active: 4

Description:

Error Condition Formula

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 5

(Expected_Delivery_Date__c - Order_Date__c)> 7

Functions

-- All Function Categories --

ABS
ACOS
ADDMONTHS
AND
ASCII
ASIN

6. Enter the Error Message as “The Expected Delivery Date should not exceed 7 days.”.

7. Select the Error location as Top of Page

8. Click Save.

Error Message

Example: Discount percent cannot exceed 30%

This message will appear when Error Condition formula is **true**

Error Message: The Expected Delivery Date should not exceed 7 days. 6

This error message can either appear at the top of the page or below a specific field on the page

Error Location: Top of Page Field 7

8 Save Save & New Cancel

12. Created an Inventory Manager Profile

The screenshot shows the Salesforce Setup interface under the Profiles tab. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The left sidebar has 'Profiles' selected. A search bar at the top left contains 'Profiles'. Below it, a message says 'Didn't find what you're looking for? Try using Global Search.' The main area is titled 'Profiles' and shows a list of profiles with columns for 'Action', 'Profile Name', 'User License', and 'Custom'. One profile, 'Standard User', is highlighted with a red box around its 'Edit | Clone' link. Other profiles listed include 'Salesforce API Only System Integrations', 'Silver Partner User', 'Solution Manager', 'Standard Platform User', and 'System Administrator'. A navigation bar at the bottom right includes letters from A to Z and 'Other'.

Clone Profile

Enter the name of the new profile.

The dialog box title is 'You must select an existing profile to clone from.' It shows the 'Existing Profile' as 'Standard User' and 'User License' as 'Salesforce'. The 'Profile Name' field contains 'Inventory Manager' and is highlighted with a red box. At the bottom are 'Save' and 'Cancel' buttons, with 'Save' also highlighted with a red box.

The screenshot shows the 'Custom App Settings' page for the 'Inventory Manager' profile. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The left sidebar has 'Profiles' selected. The main area is titled 'Custom App Settings' and shows two columns of app settings. The left column includes 'All Tabs (standard__AltTabSet)', 'Analytics Studio (standard__Insights)', 'App Launcher (standard__AppLauncher)', 'Bolt Solutions (standard__lightningBolt)', 'Community (standard__Community)', 'Content (standard__Content)', 'Data Manager (standard__DataManager)', 'Digital Experiences (standard__SalesforceCMS)', 'Lightning Usage App (standard__LightningInstrumentation)', 'Marketing CRM Classic (standard__Marketing)', and 'Medical Inventory Management (Medical_Inventory_Management)'. The right column includes 'Sales (standard__LightningSales)', 'Sales Console (standard__LightningSalesConsole)', 'Salesforce Chatter (standard__Chatter)', 'Salesforce Scheduler Setup (standard__LightningScheduler)', 'Sample Console (standard__ServiceConsole)', 'Service (standard__Service)', 'Service Console (standard__LightningService)', 'Site.com (standard__Sites)', 'Subscription Management (standard__RevenueCloudConsole)', and 'WDC (standard__Work)'. The 'Medical Inventory Management' row is highlighted with a red box around its 'Visible' and 'Default' checkboxes.

Custom Object Permissions

	Basic Access			Data Administration				Basic Access			Data Administration		
	Read	Create	Edit	Delete	View All	Modify All		Read	Create	Edit	Delete	View All	Modify All
Inventory Transactions	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>										
Order Items	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>										
Products	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>										
Purchase Orders								<input checked="" type="checkbox"/>					
Suppliers								<input checked="" type="checkbox"/>					

Password Policies

User passwords expire in	Never expires
Enforce password history	3 passwords remembered
Minimum password length	8
Password complexity requirement	Must include alpha and numeric characters
Password question requirement	Cannot contain password
Maximum invalid login attempts	10
Lockout effective period	15 minutes
Obscure secret answer for password resets	<input type="checkbox"/>
Require a minimum 1 day password lifetime	<input type="checkbox"/>
Don't immediately expire links in forgot password emails	<input type="checkbox"/> <small>i</small>

12.1 Created an Purchase Manager Profile

Password Policies

User passwords expire in	Never expires <input checked="" type="button"/>
Enforce password history	3 passwords remembered <input checked="" type="button"/>
Minimum password length	8 <input type="text"/>
Password complexity requirement	Must include alpha and numeric characters <input checked="" type="button"/>
Password question requirement	Cannot contain password <input checked="" type="button"/>
Maximum invalid login attempts	10 <input type="button"/>
Lockout effective period	15 minutes <input checked="" type="button"/>
Obscure secret answer for password resets	<input type="checkbox"/>
Require a minimum 1 day password lifetime	<input type="checkbox"/>
Don't immediately expire links in forgot password emails	<input type="checkbox"/> i

Save Save & New Cancel

13. Created a Purchasing Manager Role.

Setup Home Object Manager

Q. roles

Users Roles

Feature Settings

- Sales
 - Contact Roles on Contracts
 - Contact Roles on Opportunities
- Service
- Case Teams
 - Case Team Roles
 - Contact Roles on Cases

Didn't find what you're looking for? Try using Global Search.

SETUP Roles

Help for this Page [?](#)

Understanding Roles

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](#)

The roles and their descriptions are:

- Executive Staff**
 - CEO, President**: Can view & edit data, roll up totals, & generate reports for all users. Can't access data of other users above or at same level.
 - CFO, VP, Sales**: Can view & edit data, roll up totals, & generate reports for all users. Can't access data of other users above or at same level.
- Western Sales Director**
 - Western Sales Rep**: Can view & edit data, roll up totals, & generate reports for all users. Can't access data of other users above or at same level.
 - CA Sales Rep**: Can view & edit data, roll up totals, & generate reports for all users. Can't access data of other users above or at same level.
 - NY Sales Rep**: Can view & edit data, roll up totals, & generate reports for all users. Can't access data of other users above or at same level.
- Eastern Sales Director**
 - Eastern Sales Rep**: Can view & edit data, roll up totals, & generate reports for all users. Can't access data of other users above or at same level.
- International Sales Director**
 - Asian Sales Rep**: Can view & edit data, roll up totals, & generate reports for all users. Can't access data of other users above or at same level.
 - European Sales Rep**: Can view & edit data, roll up totals, & generate reports for all users. Can't access data of other users above or at same level.

Set Up Roles Don't show this page again

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**

13.1 Created a Inventory Manager Role.

Setup Home Object Manager

Q: roles

Users Roles

Feature Settings

Sales

Contact Roles on Contracts

Contact Roles on Opportunities

Service Case Teams

Case Team Roles

Contact Roles on Cases

Didn't find what you're looking for? Try using Global Search.

Understanding Roles

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

```

graph TD
    CEO[CEO - President] --> CFO[CFO - VP, Sales]
    CFO --> SalesDir[Sales Director]
    SalesDir --> WestDir[Western Sales Director]
    SalesDir --> EastDir[Eastern Sales Director]
    SalesDir --> IntDir[International Sales Director]
    WestDir --> CARep[CA Sales Rep]
    WestDir --> ORRep[OR Sales Rep]
    EastDir --> NYRep[NY Sales Rep]
    EastDir --> MARep[MA Sales Rep]
    IntDir --> ASRep[Asian Sales Rep]
    IntDir --> ESRep[European Sales Rep]
  
```

- * View & edit data, roll up data from all users below
- * Create reports for all users directly or at same level
- * Can access data of all users directly or at same level
- * View & edit data, roll up data from all users directly or at same level
- * Create reports for all users directly or at same level
- * Can access data of all users directly or at same level

Set Up Roles Don't show this page again

The screenshot shows the 'Role Edit' screen under the 'Setup' tab. The title is 'New Role'. The 'Role Edit' form has a red box around the top section containing fields for 'Label' (Inventory Manager), 'Role Name' (Inventory_Manager), and 'This role reports to' (SVP, Sales & Marketing). Below this is a field 'Role Name as displayed on reports' which is empty. At the bottom are three buttons: 'Save' (highlighted with a red box), 'Save & New', and 'Cancel'.

14. Created a Permission Set.

1. Go to setup >> type Permission in quick find box >> Select Permission Set >> click on New.

The screenshot shows the 'Permission Sets' screen under the 'Setup' tab. The title is 'Permission Sets'. The left sidebar has a red box around the 'Permission Sets' link. The main area shows a table of existing permission sets with columns for 'Action', 'Permission Set Label', 'Description', and 'License'. A 'New' button is highlighted with a red box at the top left of the table. The table lists various permission sets like Action, Buyer, Buyer Manager, etc., with their respective descriptions and licenses.

2. Enter Label as Purchase Manager Create Access >> Click on Save.

The screenshot shows the 'Permission Sets' page in the Salesforce setup. A new permission set is being created with the following details:

- Label:** Purchase Manager Create Access
- API Name:** Purchase_Manager
- Description:** (Empty)
- Session Activation Required:** (unchecked)

The 'Save' button is highlighted with a red box.

- From Object Settings >> Select Order Item >> Enable for both Tab Available and Visible >> Enable Read and Create in Object Permissions >> Click on Save.

The screenshot shows the 'Purchase Manager Create Access' permission set detail page. Under the 'Order Items' tab, the following settings are visible:

- Tab Settings:** Both 'Available' and 'Visible' checkboxes are checked and highlighted with a red box.
- Object Permissions:** The 'Enabled' column for 'Read' and 'Create' permissions is checked and highlighted with a red box.

The 'Save' button is highlighted with a red box.

- Navigate to the Permission Set detail page >> Click Manage Assignments >> Click Add Assignments >> Select the user John PurchaseM to assign the permission set to and click Next.

... > PERMISSION SET 'PURCHASE MANAGER CREATE ACCESS' > MANAGE ASSIGNMENT EXPIRATION

Purchase Manager Create Access

Select Users to Assign

Active Users

Full Name	Alias	Username	Role	Active	Profile
Annapurna Gurrum	AGurr	medicalinventory@sb.com		<input checked="" type="checkbox"/>	System Administrator
Chatter Expert	Chatter	chatty.00dd10000058bqluaayrgohck7wjvo@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
Integration User	integ	integration@00dd10000058bqluaaa.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
John PurchaseM	jpurc	john@purchasem.com	Purchasing Manager	<input checked="" type="checkbox"/>	Purchase Manager
Security User	sec	insightssecurity@00dd10000058bqluaaa.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User

5. Select No Expiration date >> Click on Assign.

... > PERMISSION SET 'PURCHASE MANAGER CREATE ACCESS' > MANAGE ASSIGNMENT EXPIRATION

Purchase Manager Create Access

Select an Expiration Option For Assigned Users

No expiration date (i)

Specify the expiration date

1 Day | 1 Week | 30 Days | 60 Days | Custom Date

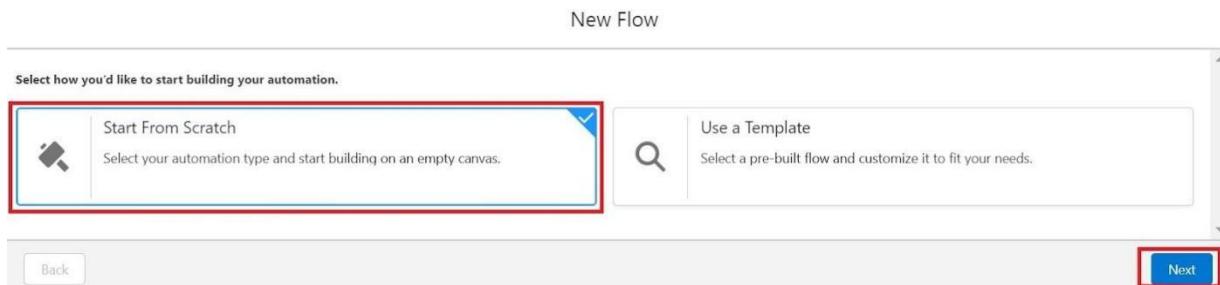
Time Zone
Select a time zone...

Selected Users

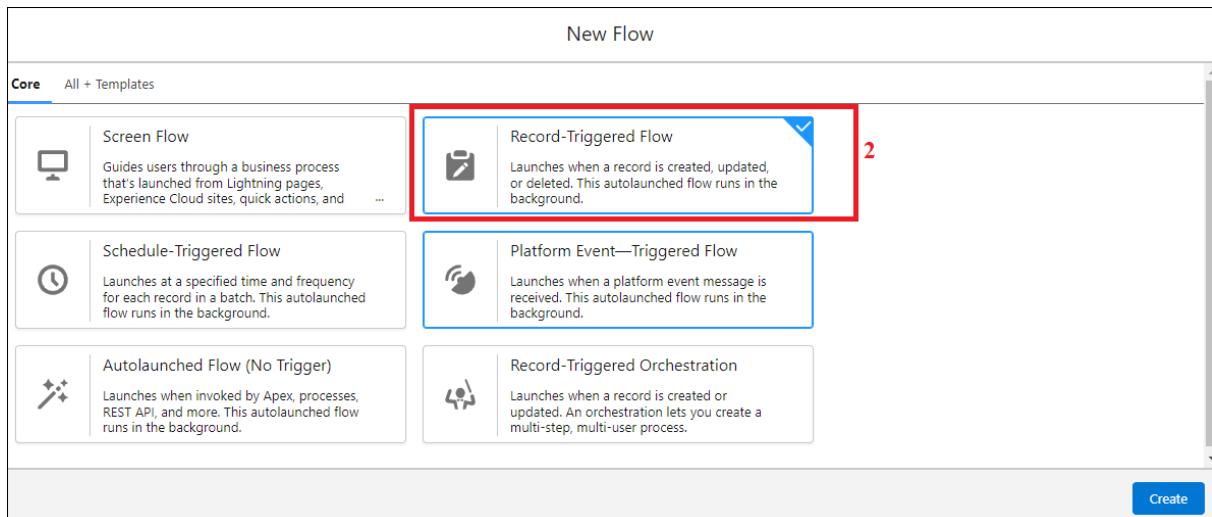
Full Name	Role	Profile	Active	User License	Expires On
John PurchaseM	Purchasing Manager	Purchase Manager	<input checked="" type="checkbox"/>	Salesforce	Never Expires

15. Created Flow to update the Actual Delivery Date.

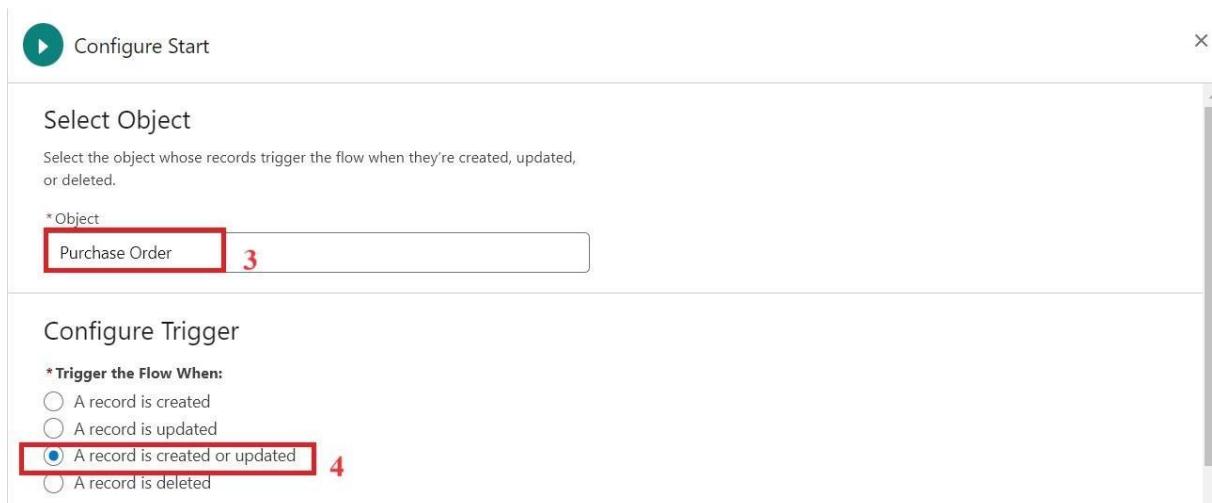
1. Go to setup >> type Flow in quick find box >> Click on the Flow and Select the New Flow >> Start From Scratch .



2. Select the record Triggered flow.Click on create.



3. Under Object select “Purchase Order”
4. Select A record is created or updated



5. Set Entry Conditions : None

6. Select Fast Field Updates and click on Done

Set Entry Conditions

Specify entry conditions to reduce the number of records that trigger the flow and the number of times the flow is executed. Minimizing unnecessary flow executions helps to conserve your org's resources.

If you create a flow that's triggered when a record is updated, we recommend first defining entry conditions. Then select the **Only when a record is updated to meet the condition requirements** option for When to Run the Flow for Updated Records.

Condition Requirements

None

5

* Optimize the Flow for:

Fast Field Updates

Update fields on the record that triggers the flow to run. This high-performance flow runs *before* the record is saved to the database.

6

Actions and Related Records

Update any record and perform actions, like send an email. This more flexible flow runs *after* the record is saved to the database.

Include a Run Asynchronously path to access an external system after the original transaction for the triggering record is successfully committed

7. Under the record trigger flow click on the “+” icon and select Get Records.

8. Enter Label as “ Get Purchase Record ”.

9. For Object select Purchase Order.

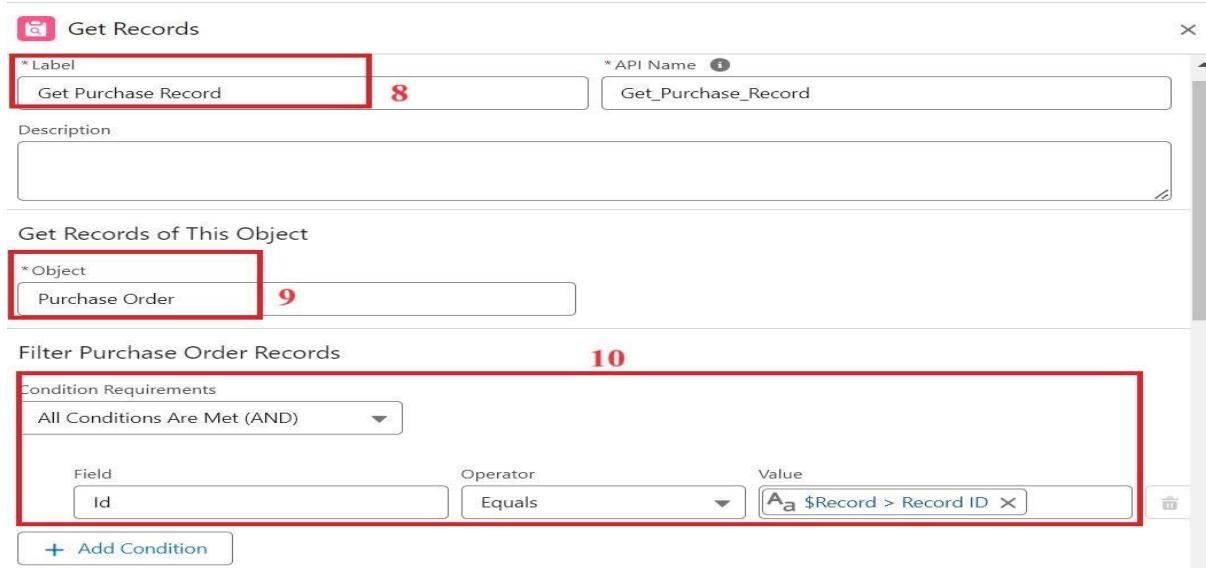
10. For Condition Requirements , select All Conditions are Met(AND)

For the first condition select as follows:

Field: Id

Operator: Equals

Value: { !\$Record.Id }



11. For How many Records to store Select Only the First Record.
12. For How to Store Record Data select Choose fields and let Salesforce do the rest. Select Field: Order_Date__c. Click on Done.



13. In the Flow Builder, click on the Manager tab on the left-hand side >> Click on New Resource >> In the Resource Type dropdown, select Variable.
14. Enter API name as ActualDeliveryDate >> Select Data type as Date >> Click on Done.
15. From the Toolbox drag and drop Assignment element.
16. Enter the label as “Assignment”.

17. Set Variable Values:

a) Variable : { !ActualDeliveryDate }

Operator : Equals

Value : { !\$Record.Order_Date__c }

b) Variable : { !ActualDeliveryDate }

Operator : Add

Value : 3

* Label
Assignment

* API Name ⓘ
Assignment_1

Description

Set Variable Values

Each variable is modified by the operator and value combination.

Variable	Operator	Value
ActualDeliveryDate	Equals	\$Record > Order Date
ActualDeliveryDate	Add	3

+ Add Assignment

18. Click Done

19. From the Toolbox drag and drop Update Records element and connect to the Assignment element.

20. Enter the label as “Updating Purchasing Order”.

21. How to Find Records to Update and Set Their Values : Use the Purchase Order record that triggered the flow

22. Set Filter Conditions : None -Always Update Record

23. Set Field Values for the Trip Record as

Field : Actual_Delivery_Date__c

Value : { !ActualDeliveryDate }

Update Records

* How to Find Records to Update and Set Their Values

Use the purchase order record that triggered the flow

Update records related to the purchase order record that triggered the flow

Use the IDs and all field values from a record or record collection

Specify conditions to identify records, and set fields individually

Because this flow runs *before* a record is saved, you can only update the record that triggered the flow to run. To update other records, configure the trigger to run the flow *after* the record is saved.

Set Filter Conditions

Condition Requirements to Update Record

None—Always Update Record

Set Field Values for the Purchase Order Record

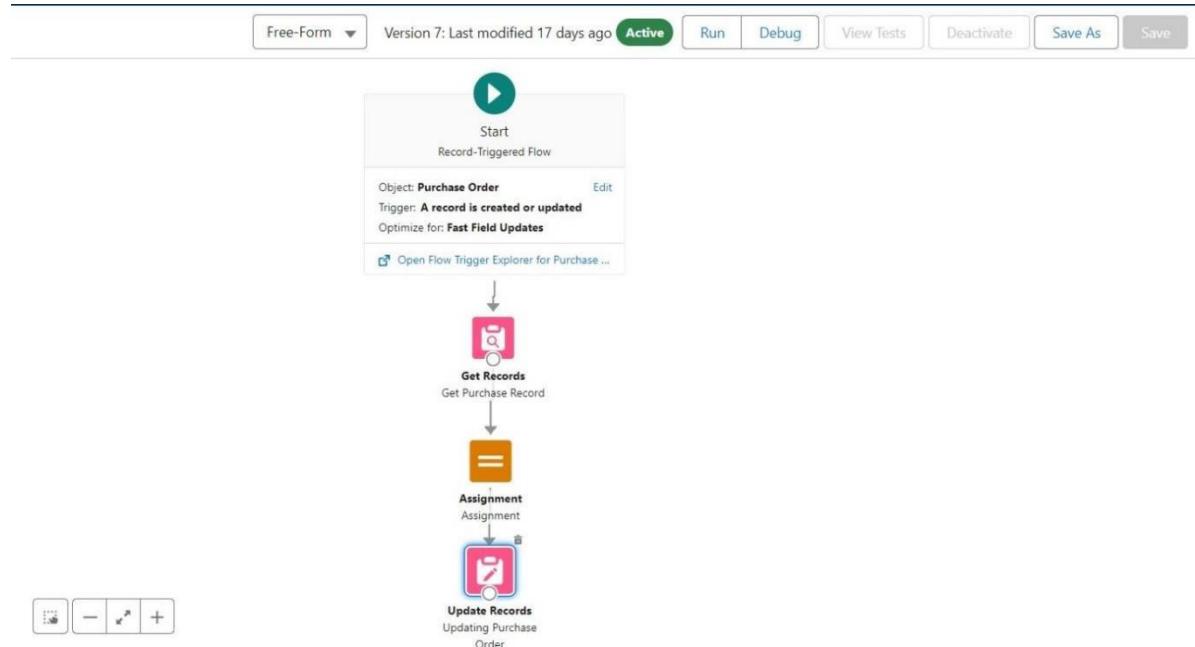
Field: Actual_Delivery_Date_c Value: ActualDeliveryDate

+ Add Field

24. Click Done

25. Save the flow as “Actual Delivery Date Updating”.

26. Activate the flow.



16. Created a Trigger to Calculate total amount on Order Item.

Step 1 : Login to Salesforce:

Log in to your Salesforce account with administrative privileges.

Step 2:

i) Navigate to Setup: Once logged in, click on the gear icon ?? (Setup) located at the top-right corner of the page. This will open the Setup menu.

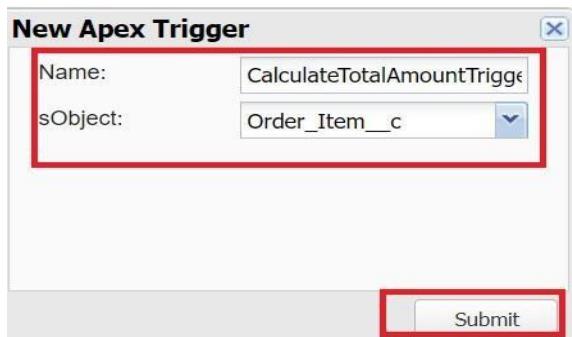
ii) Click on Developer Console: Click on the "Developer Console" option from the Setup menu. This will open the Developer Console in a new browser tab or window.

Step 3:

i) In the Developer Console window, go to the top menu and click on "File".

ii) Select New: From the dropdown menu under "File", select "New".

iii) Choose Apex Trigger: This will open a new Apex Trigger editor tab.



Create an Apex Trigger:

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

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

Step 4:

i) In the Developer Console window, go to the top menu and click on "File".

ii) Select New: From the dropdown menu under "File", select "New".

iii) Choose Apex Class: Name it as CalculateTotalAmountHandler

```
public class CalculateTotalAmountHandler {  
  
    // Method to calculate the total amount for Purchase Orders based on related  
    Order Items  
    public static void calculateTotal(List<Order_Item__c> newItems,  
List<Order_Item__c> oldItems, Boolean isInsert, Boolean isUpdate, Boolean  
isDelete, Boolean isUndelete) {  
  
        // Collect Purchase Order IDs affected by changes in Order_Item__c  
        records  
        Set<Id> parentIds = new Set<Id>();  
  
        // For insert, update, and undelete scenarios  
        if (isInsert || isUpdate || isUndelete) {  
            for (Order_Item__c ordItem : newItems) {  
                parentIds.add(ordItem.Purchase_Order_Id__c);  
            }  
        }  
    }  
}
```

```
}
```

```
// For update and delete scenarios
```

```
if (isUpdate || isDelete) {
```

```
    for (Order_Item__c ordItem : oldItems) {
```

```
        parentIds.add(ordItem.Purchase_Order_Id__c);
```

```
    }
```

```
}
```

```
// Calculate the total amounts for affected Purchase Orders
```

```
Map<Id, Decimal> purchaseToUpdateMap = new Map<Id, Decimal>();
```

```
if (!parentIds.isEmpty()) {
```

```
    // Perform an aggregate query to sum the Amount__c for each Purchase  
    Order
```

```
    List<AggregateResult> aggrList = [
```

```
        SELECT Purchase_Order_Id__c, SUM(Amount__c) totalAmount
```

```
        FROM Order_Item__c
```

```
        WHERE Purchase_Order_Id__c IN :parentIds
```

```
        GROUP BY Purchase_Order_Id__c
```

```
];
```

```
// Map the result to Purchase Order IDs
```

```
for (AggregateResult aggr : aggrList) {
```

```
    Id purchaseOrderId = (Id)aggr.get('Purchase_Order_Id__c');
```

```
    Decimal totalAmount = (Decimal)aggr.get('totalAmount');
```

```
    purchaseToUpdateMap.put(purchaseOrderId, totalAmount);
```

```
}
```

```

// Prepare Purchase Order records for update

List<Purchase_Order__c> purchaseToUpdate = new
List<Purchase_Order__c>();
for (Id purchaseOrderId : purchaseToUpdateMap.keySet()) {
    Purchase_Order__c purchaseOrder = new Purchase_Order__c(Id =
purchaseOrderId, Total_Order_cost__c =
purchaseToUpdateMap.get(purchaseOrderId));
    purchaseToUpdate.add(purchaseOrder);
}

// Update Purchase Orders if there are any changes
if (!purchaseToUpdate.isEmpty()) {
    update purchaseToUpdate;
}
}

}

```

Save all.

17. Created a Purchase Orders based on Suppliers(Summary) Report

1. Click App Launcher
2. Select Medical Inventory Management App
3. Click on Reports tab
4. Click on New Report.
5. Click the report type as Purchase Orders Click Start report.

Create Report

Category

Recently Used

All

- Accounts & Contacts
- Opportunities
- Customer Support Reports
- Leads
- Campaigns
- Activities
- Contracts and Orders

Select a Report Type

Q. Purchase

Showing results for Purchase

Report Type Name	Category
Purchase Orders	Standard
Purchase Orders with Supplier ID	Standard
Purchase Orders with Order Items	Standard
Purchase Orders with Order Items and Product ID	Standard
Inventory Transactions with Purchase Order ID	Standard

Details

Purchase Orders
Standard Report Type

Start Report

Fields (17)

Created By You
Purchase Orders based on Suppliers

Created By Others
No Recycle Bin

6. Click on Filters and select as follows and click on Apply

Outline

Filters

Filters

Add filter...

Show Me
All purchase orders

Actual Delivery Date
All Time

7. Customize your report, in group rows select – Supplier ID, Purchase Order: Purchase Order ID, for columns Order Count, Total Order Cost (In this way we are making a Summary Report).

8. Click save and run

9. Give report name – Purchase Orders based on Suppliers.

10. Click Save

NOTE: In this report you can see your all record of the object you selected for reporting

(What you selects in “Select a report type option”)

Previewing a limited number of records. Run the report to see everything.

Supplier ID	Purchase Order: Purchase Order ID	Order Count	Total Order Cost
Supplier-001 (4)	Purchase-0001 (1)	3	₹2,075.00
	Purchase-0002 (1)	2	₹3,250.00
	Purchase-0003 (1)	3	₹7,000.00
	Purchase-0004 (1)	4	₹9,500.00
Supplier-002 (1)	Purchase-0005 (1)	2	₹4,500.00
Total (5)		14	₹26,325.00

View Report

1. Click on App Launcher on the left side of the screen.
2. Search Medical Inventory Management App & click on it.
3. Click on Reports Tab.
4. Click on Purchase Orders based on Suppliers and see records.

Report: Purchase Orders
Purchase Orders based on Suppliers

Total Records: 5 Total Order Count: 14 Total Total Order Cost: ₹26,325.00

Supplier ID	Purchase Order: Purchase Order ID	Order Count	Total Order Cost
Supplier-001 (4)	Purchase-0001 (1)	3	₹2,075.00
	Purchase-0002 (1)	2	₹3,250.00
	Purchase-0003 (1)	3	₹7,000.00
	Purchase-0004 (1)	4	₹9,500.00
Supplier-002 (1)	Purchase-0005 (1)	2	₹4,500.00
Total (5)		14	₹26,325.00

17.1 Created a Complete Purchase Details Report

1. Click App Launcher
2. Select Medical Inventory Management App
3. Click on Reports tab

4. Click on New Report.

5. Click the report type as Purchase Orders with Order Items and Product ID
>> Click Start report.

6. Click on Filters and select as follows and click on Apply

The screenshot shows the 'Filters' section of a reporting tool. At the top, there's a 'Filters' button with a dropdown arrow. Below it is a search bar with the placeholder 'Add filter...' and a magnifying glass icon. A red box highlights the 'Show Me' section, which contains the option 'All purchase orders'. Another red box highlights the 'Actual Delivery Date' section, which contains the option 'All Time'.

7. Customize your report, in group rows select – Supplier ID, Actual Delivery Date, Purchase Order: Purchase Order ID, for columns Product ID : Product ID, Product ID : Product Name, Order Count, Quantity Received, Amount (In this way we are making a Summary Report).

8. Click save and run

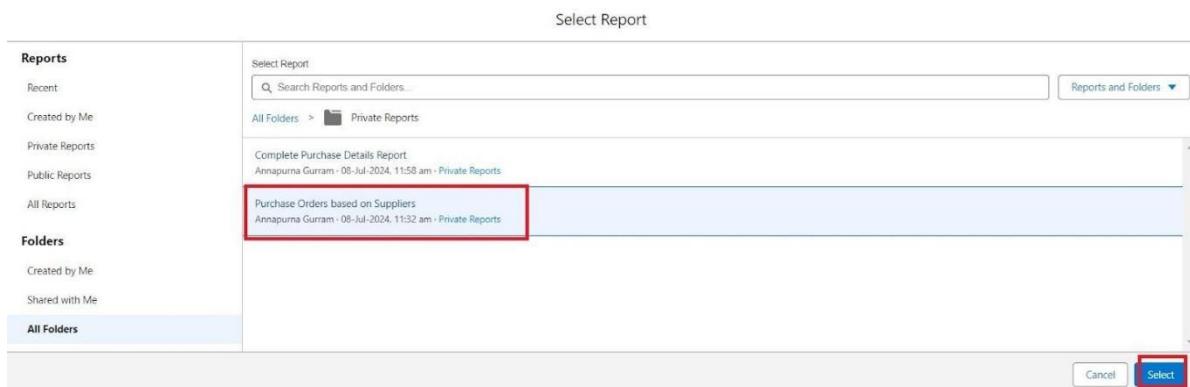
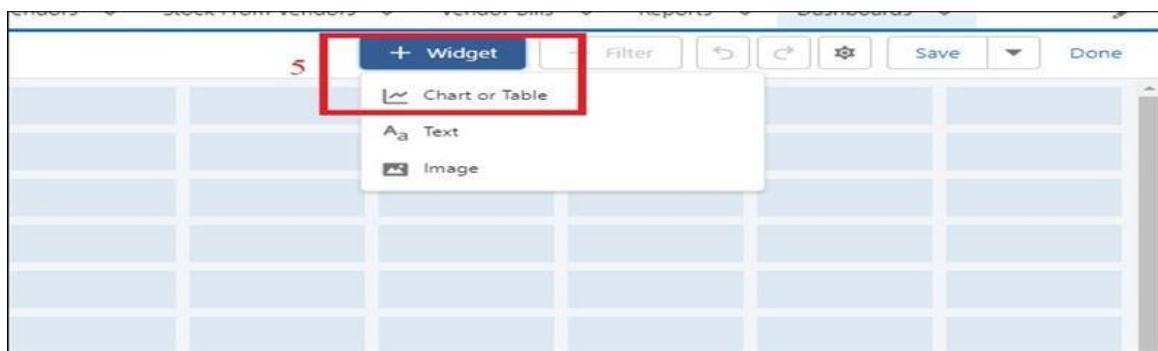
9. Give report name – Complete Purchase Details Report

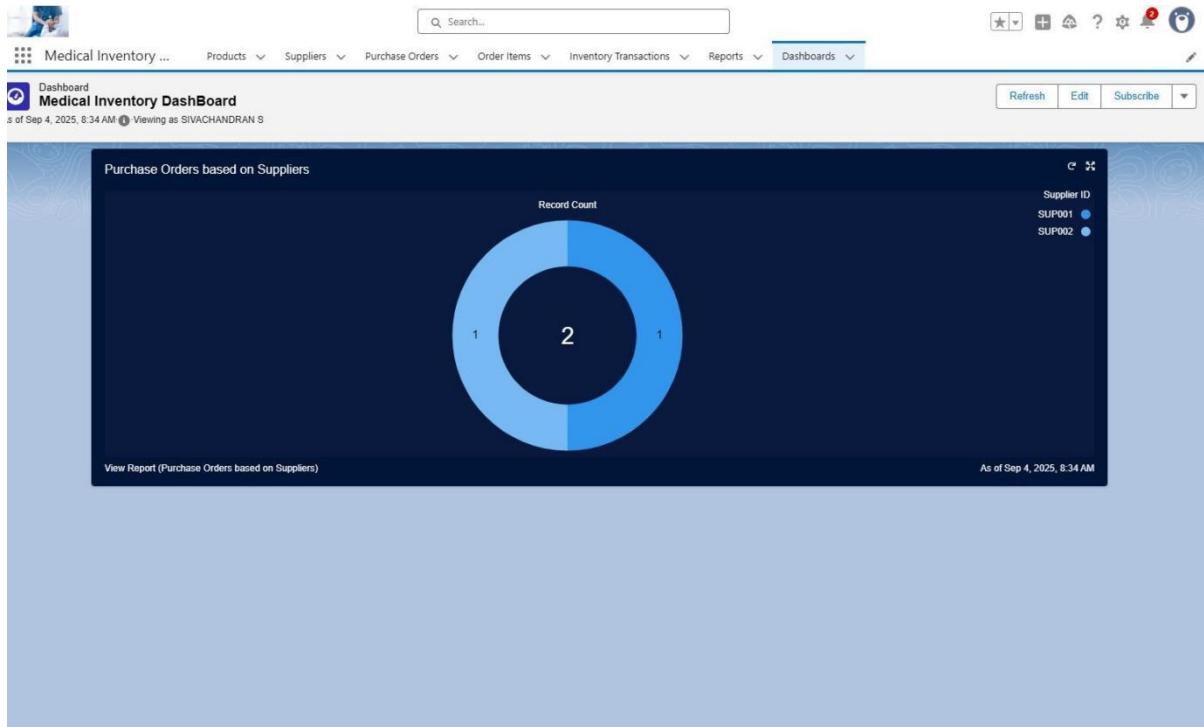
10. Click Save

The screenshot shows the 'Complete Purchase Details Report' interface. At the top, there's a navigation bar with 'Products', 'Purchase Orders', 'Order Items', 'Inventory Transactions', 'Suppliers', 'Reports', and 'Dashboards'. Below the navigation is a toolbar with 'Save & Run' (highlighted with a red box), 'Save', 'Close', and 'Run'. On the left, there's a 'REPORT' sidebar with 'Outline' and 'Filters' tabs. Under 'Fields', the 'Groups' section has 'Supplier ID', 'Actual Delivery Date', and 'Purchase Order: Purchase Order ID' selected. The 'Columns' section has 'Product ID: Product ID', '# Order Count', 'Product ID: Product Name', '# Quantity Received', and '# Amount' selected. A red box highlights the 'Groups' section. The main area shows a preview of the report data, grouped by supplier and date. The data includes columns for Supplier ID, Actual Delivery Date, Purchase Order ID, Product ID, Product Name, Order Count, Quantity Received, and Amount. Subtotals are shown for each group. A red box highlights the 'Subtotal' row for 22/06/2024. At the bottom, there are checkboxes for 'Row Counts', 'Detail Rows', 'Subtotals', and 'Grand Total', all of which are checked. A red box highlights the 'Subtotals' checkbox.

18. Created Dashboard

1. Click on the Dashboards tab from the Medical Inventory Management application.
2. Click on the new dashboard.
3. Give name - Medical Inventory DashBoard
4. Click create
5. Click on +widget
6. Select the Purchase Orders based on Suppliers Report
7. For the data visualization select any of the charts, tables etc. as per your choice/requirement
8. Click add.
9. Click save.





19. Testing Approach

To ensure the app works as intended:

- **Step 1:** Created sample suppliers, products, purchase orders, and transactions.
- **Step 2:** Verified validations by entering incorrect data.
- **Step 3:** Checked automation by adding inbound transactions to see if stock updated correctly.
- **Step 4:** Reviewed reports and dashboards to ensure accurate totals.

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

Recently Viewed

Product ID

1	P004
2	P003
3	P002
4	P001

Supplier ID

1	SUP002
2	SUP001

Purchase Order ID

1	P002
2	P001

Order Item ID

1	OI002
2	OI001

Inventory Transaction ID

1	T002
2	T001

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

Report: Purchase Orders with Order Items and Product ID
Complete Purchase Details Report

Total Records: 2 Total Order Count: 2 Total Quantity Received: 90 Total Amount: \$6,600.00

Supplier ID	Actual Delivery Date	Purchase Order: Purchase Order ID	Product ID: Product ID	Order Count	Product ID: Product Name	Quantity Received	Amount
SUP091 (1)	9/4/2025 (1)	P901 (1)	91tgk00000STAF6	1	Fever Tablet	60	\$3,600.00
			Subtotal			1	\$3,600.00
						60	\$3,600.00
			Subtotal			1	\$3,600.00
						60	\$3,600.00
SUP092 (1)	9/5/2025 (1)	P902 (1)	91tgk00000STTYR	1	Cough Syrup	30	\$3,000.00
			Subtotal			1	\$3,000.00
						30	\$3,000.00
			Subtotal			1	\$3,000.00
						30	\$3,000.00
			Total (2)			2	\$6,600.00

Row Counts: Detail Rows: Subtotals: Grand Total:

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

Dashboard Medical Inventory Dashboard

As of Sep 4, 2025, 8:34 AM Viewing as SIVACHANDRAN S

Purchase Orders based on Suppliers

Record Count

Supplier ID	Record Count
SUP091	1
SUP092	1

View Report (Purchase Orders based on Supplies) As of Sep 4, 2025, 8:34 AM

20. Conclusion

The **Medical Inventory Management System** successfully demonstrates how Salesforce can be used to manage medical products, suppliers, and stock efficiently.

By using custom objects, validation rules, flows, reports, and dashboards, the application provides a complete solution for inventory management with real-time tracking and analytics.