

# **MEDICAL INVENTORY MANAGEMENT**

**College Name: Sree NarayanaGuruCollege**

**College Code: bru36**

**Team ID: NM2025TMID26514**

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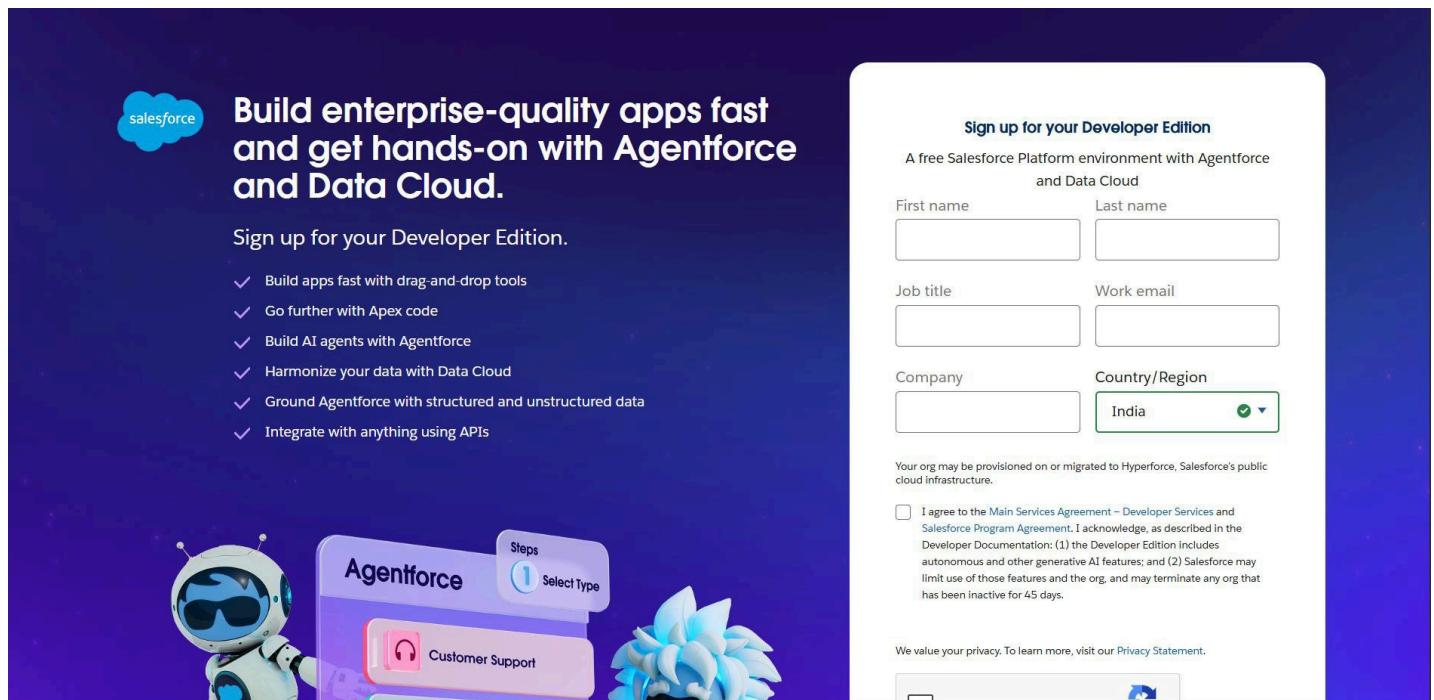
## 1.2 Purpose

The purpose of this project is to design and implement a Salesforce-based Medical Inventory Management System that ensures efficient tracking, management, and monitoring of medicines, medical supplies, and related transactions within healthcare organizations such as hospitals, pharmacies, and clinics.

## 2. Development Phase

**Creating a developer account :** We can create an developers account in salesforce by using the following url

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



**Creating objects:-** We created object named Products , Purchase Order, Order Item, Inventory Transaction and Supplier.

Cloud icon

Setup Home Object Manager

Search Setup

Star, Plus, Question, Gear, Bell, User icons

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

**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

Cloud icon

Setup Home Object Manager

Search Setup

Star, Plus, Question, Gear, Bell, User icons

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

**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

Cloud icon

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  
Search Layouts  
List View Button Layout  
Restriction Rules  
Scoping Rules

**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

Cloud icon

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

**Details**

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

Edit Delete

SETUP > OBJECT MANAGER

## Supplier

**Details**

Description	API Name Supplier_c
Custom	Singular Label Supplier
✓	Plural Label Suppliers
Enable Reports	
✓	
Track Activities	
✓	
Track Field History	
✓	
Deployment Status	
Deployed	
Help Settings	
Standard salesforce.com Help Window	

<https://orgfarm-f851a23da-dev-ed.develop.lightning.force.com/lightning/eehm/ObjectManager/01nK000001vKz/Details/view>

**Creating Tabs :-** We have created the tabs for the custom made objects Products , Purchase Order, Order Item, Inventory Transaction and Supplier

SETUP

tab

**Tabs**

### 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	Bell	
Edit   Del	Order Items	Lightning	
Edit   Del	Products	Bell	
Edit   Del	Purchase Orders	Apple	
Edit   Del	Suppliers	Desk	

**Web Tabs**

No Web Tabs have been defined

**Visualforce Tabs**

No Visualforce Tabs have been defined

**Creating the Lightning app :-** We created an lightning app named Medical Inventory Management with items Products, Purchase Orders, Order Items, Inventory Transactions, Suppliers, Reports, and Dashboards and Profiles with System Administrator.

App Settings

**App Details & Branding**

App Details & Branding

Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.

App Details

\* App Name

Image

Primary Color Hex Value

\* Developer Name

Description

App Branding

Org Theme Options

Use the app's image and color instead of the org's custom theme

App Launcher Preview

App Settings

**Navigation Items**

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

Type to filter list...

- Accounts
- Activation Targets
- Activations
- Active Scratch Orgs
- All Sites
- Alternative Payment Methods
- Analytics
- App Launcher
- Appointment Categories
- Appointment Invitations
- ...

Selected Items

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

The screenshot shows the 'User Profiles' section of the Lightning App Builder. On the left, a sidebar lists 'App Settings' options: App Details & Branding, App Options, Utility Items (Desktop Only), Navigation Items, and User Profiles (which is selected). The main area is titled 'User Profiles' and contains a sub-section 'Available Profiles'. A search bar at the top of this list allows filtering. Below the search bar is a list of profiles: Analytics Cloud Integration User, Analytics Cloud Security User, Anypoint Integration, Authenticated Website, B2B Reordering Portal Buyer Profile, Contract Manager, Custom: Marketing Profile, Custom: Sales Profile, Custom: Support Profile, and Customer Community Login User. To the right of this list is a 'Selected Profiles' panel containing 'System Administrator' and 'Inventory Manager'. Navigation arrows between the two panels allow profiles to be moved from one to the other.

## Configuring Fields and Relationship :- We created various fields and relationship for each custom objects.

The screenshot shows the 'Object Manager' section for the 'Product' object in Salesforce. The left sidebar lists various setup categories: Details, Fields & Relationships (which is selected), 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, and Scoping Rules. The main area is titled 'Fields & Relationships' and displays a table of fields for the 'Product' object. The table has columns for FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The listed fields are: Created By (CreatedBy, Lookup(User)), Current Stock Level (Current\_Stock\_Level\_\_c, Number(18, 0)), Last Modified By (LastModifiedBy, Lookup(User)), Minimum Stock Level (Minimum\_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)), and Unit Price (Unit\_Price\_\_c, Currency(16, 2)).

Purchase Order | Salesforce

orgfarm-f851a23daa-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgK000001vlG9/FieldsAndRelationships/view

Guest (2)

Cloud Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER  
Purchase Order

**Fields & Relationships**  
10 Items, Sorted by Field Label

Actual Delivery Date	Actual_Delivery_Date_c	Date	
Created By	CreatedBy	Lookup(User)	
Expected Delivery Date	Expected_Delivery_Date_c	Date	
Last Modified By	LastModifiedBy	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(16, 2)	

28°C Heavy rain

Search web & PC

ENG IN 10-09-2025

Inventory Transaction | Salesforce

orgfarm-f851a23daa-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgK000001vlJN/FieldsAndRelationships/view

Guest (2)

Cloud Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER  
Inventory Transaction

**Fields & Relationships**  
8 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedBy	Lookup(User)		
Last Modified By	LastModifiedBy	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)	✓	
Purchase Order ID	Purchase_Order_ID_c	Lookup(Purchase Order)	✓	
Total Order Cost	Total_Order_Cost_c	Formula (Currency)		
Transaction Date	Transaction_Date_c	Date		
Transaction ID	Name	Text(80)	✓	
Transaction Type	Transaction_Type_c	Picklist		

28°C Heavy rain

Search web & PC

ENG IN 10-09-2025

Supplier | Salesforce

orgfarm-f851a23daa-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgK000001vlKz/FieldsAndRelationships/view

Guest (2)

Cloud Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER  
Supplier

**Fields & Relationships**  
9 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Address	Address_c	Text(100)		
Contact Person	Contact_Person_c	Text(50)		
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(50)		

28°C Heavy rain

Search web & PC

ENG IN 10-09-2025

Order Item | Salesforce

orgfarm-f851a23daa-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgK000001vlHl/FieldsAndRelationships/view

Guest (2)

Cloud Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER  
Order Item

**Fields & Relationships**  
9 Items, Sorted by Field Label

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 ID	Name	Text(80)		✓
Product ID	Product_ID_c	Lookup(Product)		✓
Purchase Order ID	Purchase_Order_ID_c	Master-Detail(Purchase Order)		✓
Quantity Ordered	Quantity_Ordered_c	Number(18, 0)		
Quantity Received	Quantity_Received_c	Number(10, 0)		
Unit Price	Unit_Price_c	Formula (Currency)		

28°C Heavy rain

Search web & PC

ENG IN 10-09-2025

# Setup of the Page Layout:- We edited the Page Layout for the custom objects.

The screenshot shows the Salesforce Setup interface for editing the 'Product' page layout. The left sidebar lists various configuration options like Details, Fields & Relationships, Page Layouts, Lightning Record Pages, etc. The 'Page Layouts' section is selected. The main area displays the 'Fields' section of the page layout editor, which includes a 'Quick Find' search bar and a table for managing fields. The table has columns for Field Name, Type, and Description. A preview pane below shows sample data for fields like Product ID, Product Name, and Unit Price. The status bar at the bottom indicates it's 28°C Heavy rain, the time is 20:09, and the date is 10-09-2025.

The screenshot shows the Salesforce Setup interface for editing the 'Purchase Order' page layout. The left sidebar lists various configuration options. The 'Page Layouts' section is selected. The main area displays the 'Fields' section of the page layout editor, similar to the Product layout. It includes a 'Quick Find' search bar and a table for managing fields. A preview pane below shows sample data for fields like Purchase Order ID, Supplier ID, and Order Date. The status bar at the bottom indicates it's 28°C Heavy rain, the time is 20:09, and the date is 10-09-2025.

Inventory Transaction | Salesforce

orgfarm-f851a23daa-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgK000001vlJN/PageLayouts/00hgK000006djWTOAY/view Guest (2)

Cloud Search Setup Layout Properties

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

Save Quick Save Preview As... Cancel Undo Redo Layout Properties

Fields Quick Find Field Name \*  
Buttons  
Quick Actions  
Mobile & Lightning Actions  
Expanded Lookups  
Related Lists  
Report Charts

Information (Header visible on edit only)  
★ Transaction ID Sample Text  
Purchase Order ID Sample Text  
Transaction Type Sample Text  
Transaction Date 9/10/2025  
Total Order Cost \$123.45

Owner Sample Text

System Information (Header visible on edit only)  
Created By Sample Text  
Last Modified By Sample Text

Custom Links (Header visible on edit only)

Mobile Cards (Salesforce mobile only) *i*  
Drag expanded lookups and mobile-enabled Visualforce pages here to display them as mobile cards.

28°C Heavy rain Search web & PC ENG IN 10-09-2025

Supplier | Salesforce

orgfarm-f851a23daa-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgK000001vlKz/PageLayouts/00hgK000006djZhQAI/view Guest (2)

Cloud Search Setup Layout Properties

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

Save Quick Save Preview As... Cancel Undo Redo Layout Properties

Fields Quick Find Field Name \*  
Buttons  
Quick Actions  
Mobile & Lightning Actions  
Expanded Lookups  
Related Lists  
Report Charts

Information (Header visible on edit only)  
★ Supplier ID Sample Text  
Supplier Name Sample Text  
Contact Person Sample Text

Phone Number 1-415-555-1212  
Email sarah.sample@company.com  
Address Sample Text  
Owner Sample Text

System Information (Header visible on edit only)  
Created By Sample Text  
Last Modified By Sample Text

Custom Links (Header visible on edit only)

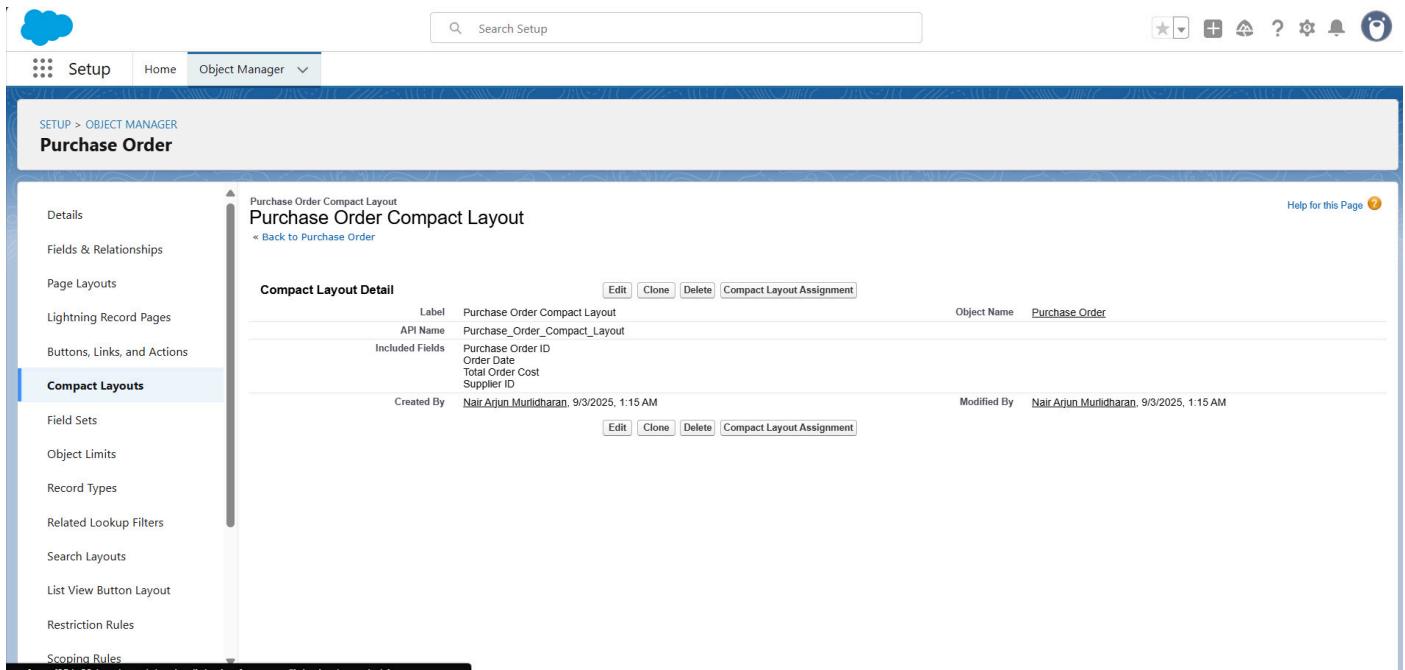
Mobile Cards (Salesforce mobile only) *i*  
Drag expanded lookups and mobile-enabled Visualforce pages here to display them as mobile cards.

28°C Heavy rain Search web & PC ENG IN 10-09-2025

The screenshot shows the Salesforce Setup interface for the 'Order Item' object. The left sidebar lists various setup categories like Details, Fields & Relationships, Page Layouts, and Lightning Record Pages. The 'Page Layouts' section is selected. The main area displays the 'Order Item' page layout configuration. It includes sections for Fields (Buttons, Quick Actions, Mobile & Lightning Actions, Expanded Lookups, Related Lists, Report Charts), Page Headers (Information, Product Details, System Information, Custom Links), and Mobile Cards (Salesforce mobile only). Buttons at the top include Save, Quick Save, Preview As..., Cancel, Undo, Redo, and Layout Properties.

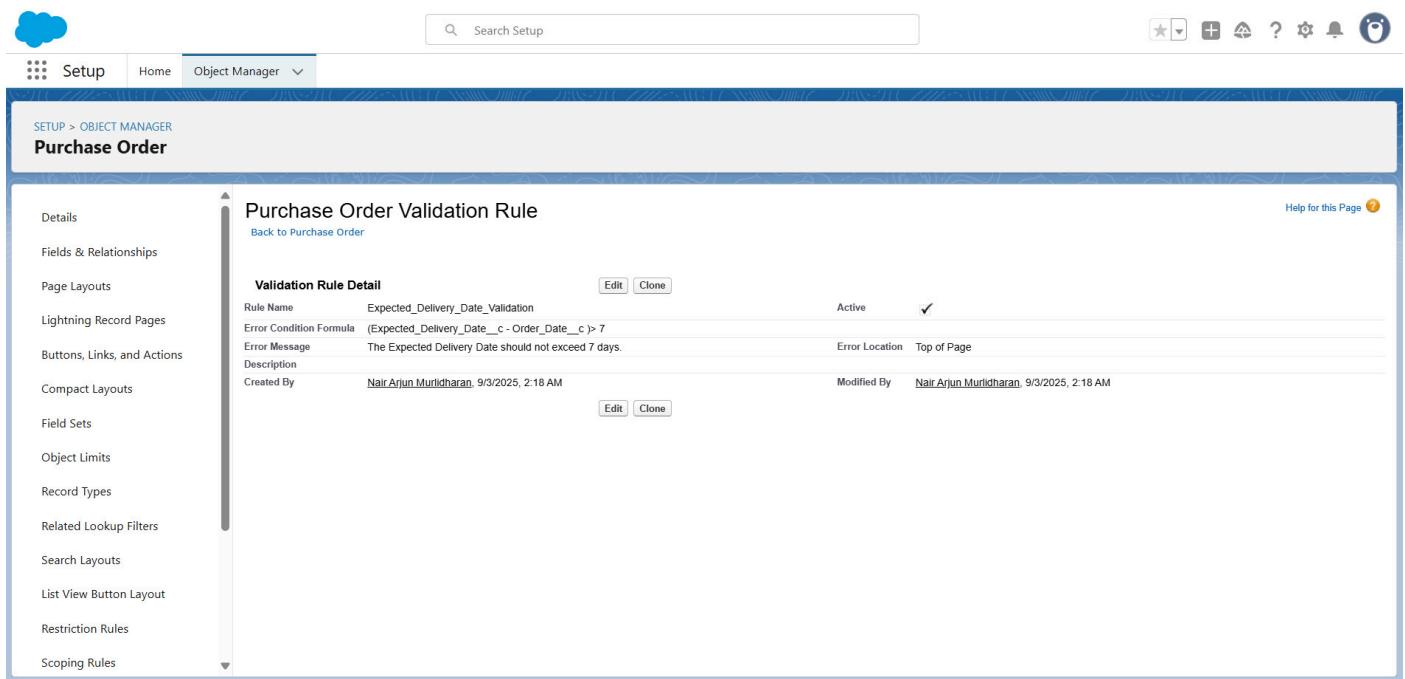
**Compact Layout:-**We created Compact Layout for the Custom object Product and Purchase Order.

The screenshot shows the Salesforce Setup interface for the 'Product' object. The left sidebar lists various setup categories. The 'Compact Layouts' section is selected. The main area displays the 'Product Compact Layout' configuration. It includes a 'Compact Layout Detail' section with fields for Label (Product Compact Layout), API Name (Product\_Compact\_Layout), Included Fields (Product Name, Unit Price, Current Stock Level), and a Created By field (Nair Arjun Murlidharan, 9/3/2025, 1:10 AM). Buttons at the top include Edit, Clone, Delete, and Compact Layout Assignment.



The screenshot shows the Salesforce Setup interface for the Purchase Order object. The left sidebar has a 'Compact Layouts' section selected. The main content area displays the 'Purchase Order Compact Layout' detail page. It includes fields for Label (Purchase Order Compact Layout), API Name (Purchase\_Order\_Compact\_Layout), Included Fields (Purchase Order ID, Order Date, Total Order Cost, Supplier ID), and Created By (Nair Arjun Muridharan, 9/3/2025, 1:15 AM). Buttons for Edit, Clone, Delete, and Compact Layout Assignment are available.

**Validation Rule:-** We created an validation rule under Purchase order for expected delivery date.



The screenshot shows the Salesforce Setup interface for the Purchase Order object. The left sidebar has a 'Validation Rules' section selected. The main content area displays the 'Purchase Order Validation Rule' detail page. It includes fields for Rule Name (Expected\_Delivery\_Date\_Validation), Error Condition Formula ((Expected\_Delivery\_Date\_\_c - Order\_Date\_\_c) > 7), Error Message (The Expected Delivery Date should not exceed 7 days.), and Active status (checked). The rule was created by Nair Arjun Muridharan on 9/3/2025, 2:18 AM. Buttons for Edit, Clone, and Validation Rule Detail are available.

## Profiles:- We created Profiles named Inventory Manager and Purchase Manager.

The screenshot shows the Salesforce Setup interface under the 'Profiles' section. The 'Inventory Manager' profile is selected. The profile detail table includes fields for Name (Inventory Manager), User License (Salesforce), Description, Created By (Nair Arjun Muridharan, 9/3/2025, 7:12 AM), Modified By (Nair Arjun Muridharan, 9/3/2025, 7:19 AM), and a 'Custom Profile' checkbox which is checked. The 'Page Layouts' section shows various standard object layouts assigned to the profile, such as Global Layout for Home Page Layout and Account Layout for Account.

The screenshot shows the Salesforce Setup interface under the 'Profiles' section. The 'Purchase Manager' profile is selected. The profile detail table includes fields for Name (Purchase Manager), User License (Salesforce), Description, Created By (Nair Arjun Muridharan, 9/3/2025, 7:20 AM), Modified By (Nair Arjun Muridharan, 9/3/2025, 7:23 AM), and a 'Custom Profile' checkbox which is checked. The 'Page Layouts' section shows various standard object layouts assigned to the profile, such as Global Layout for Home Page Layout and Account Layout for Account.

## Roles:- We created an Roles of Inventory Management and Purchasing Management.

Cloud icon

Setup Home Object Manager

Search Setup

Users Roles Feature Settings Sales Service Case Teams Didn't find what you're looking for? Try using Global Search.

## SETUP Roles

Collapse All Expand All

- Sree Narayana Guru College**
  - Add Role
  - CEO** Edit | Del | Assign
  - Add Role
  - CFO** Edit | Del | Assign
  - Add Role
  - COO** Edit | Del | Assign
  - Add Role
  - SVP\_Customer Service & Support** Edit | Del | Assign
  - Add Role
  - Customer Support\_International** Edit | Del | Assign
  - Add Role
  - Customer Support\_North America** Edit | Del | Assign
  - Add Role
  - Installation & Repair Services** Edit | Del | Assign
  - Add Role
  - SVP\_Human Resources** Edit | Del | Assign
  - Add Role
  - SVP\_Sales & Marketing** Edit | Del | Assign
  - Add Role
  - Inventory Manager** Edit | Del | Assign
  - Add Role
  - Purchasing Manager** Edit | Del | Assign
  - Add Role
  - VP\_North American Sales** Edit | Del | Assign
  - Add Role
  - VP\_International Sales** Edit | Del | Assign
  - Add Role
  - VP\_Marketing** Edit | Del | Assign

Cloud icon

Setup Home Object Manager

Search Setup

Users Roles Feature Settings Sales Service Case Teams Didn't find what you're looking for? Try using Global Search.

## SETUP Roles

### Role Inventory Manager

Help for this Page ?

Below is the list of users assigned to this role. Click Edit to modify the role name. Click Assign Users to Role to assign existing users to this role. Click New User to create a user for this role.

Hierarchy: Sree Narayana Guru College » CEO » SVP\_Sales & Marketing » Inventory Manager  
Siblings: VP\_North American Sales, VP\_Marketing, VP\_International Sales, Purchasing Manager

Users in Inventory Manager Role [0]

Label	Inventory Manager	Role Name	Inventory_Manager
This role reports to	SVP_Sales & Marketing	Role Name as displayed on reports	
Modified By	Nair Arjun Murlidharan 9/3/2025, 5:57 AM	Sharing Groups	Role, Role and Internal Subordinates
Opportunity Access	Users in this role can edit all opportunities associated with accounts that they own, regardless of who owns the opportunities		
Case Access	Users in this role can edit all cases associated with accounts that they own, regardless of who owns the cases		

Users in Inventory Manager Role

Assign Users to Role | New User | Help for this Page ?

No records to display

Cloud icon

Setup Home Object Manager

Search Setup

Users Roles Feature Settings Sales Service Case Teams Didn't find what you're looking for? Try using Global Search.

## SETUP Roles

### Role Purchasing Manager

Help for this Page ?

Below is the list of users assigned to this role. Click Edit to modify the role name. Click Assign Users to Role to assign existing users to this role. Click New User to create a user for this role.

Hierarchy: Sree Narayana Guru College » CEO » SVP\_Sales & Marketing » Purchasing Manager  
Siblings: VP\_North American Sales, VP\_Marketing, VP\_International Sales, Inventory Manager

Users in Purchasing Manager Role [0]

Label	Purchasing Manager	Role Name	Purchasing_Manager
This role reports to	SVP_Sales & Marketing	Role Name as displayed on reports	
Modified By	Nair Arjun Murlidharan 9/3/2025, 5:55 AM	Sharing Groups	Role, Role and Internal Subordinates
Opportunity Access	Users in this role can edit all opportunities associated with accounts that they own, regardless of who owns the opportunities		
Case Access	Users in this role can edit all cases associated with accounts that they own, regardless of who owns the cases		

Users in Purchasing Manager Role

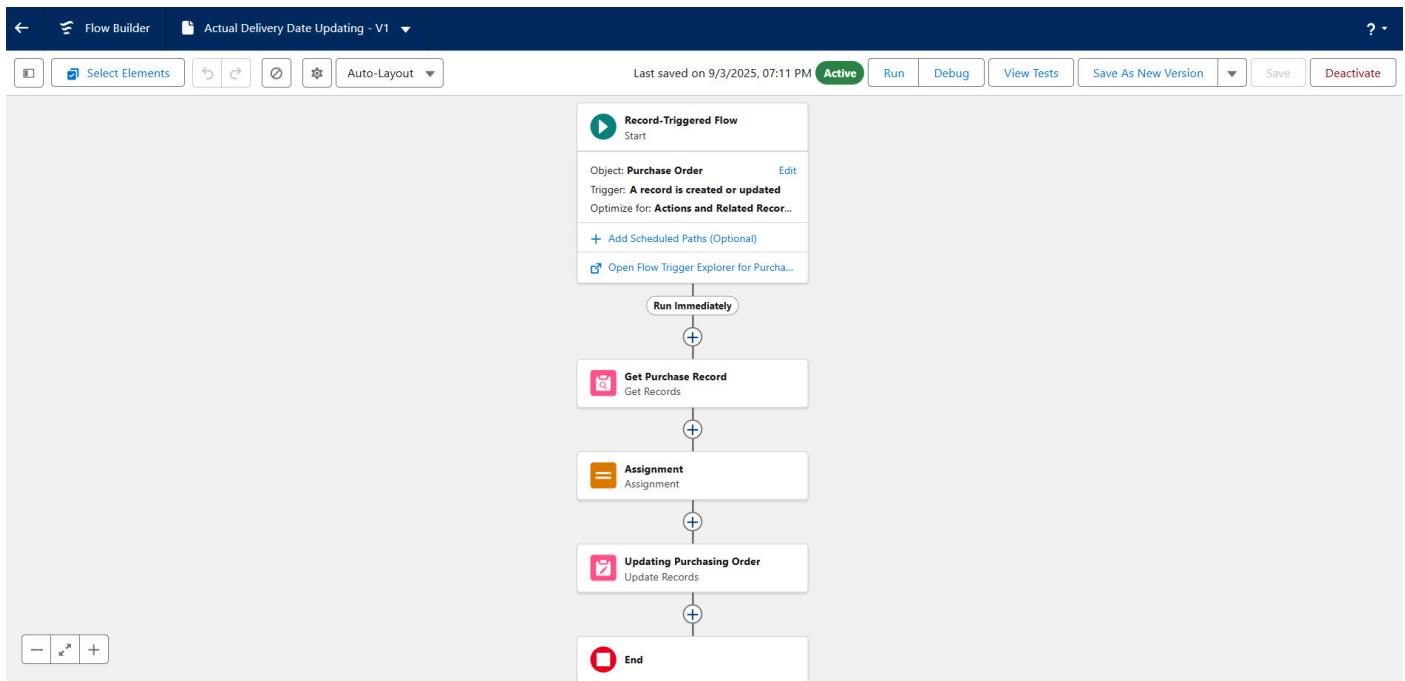
Assign Users to Role | New User | Help for this Page ?

No records to display

## Permission Sets:- We created Permission set for the Medical Inventory

The screenshot shows the Salesforce Setup interface. In the top left, there's a cloud icon, followed by 'Setup', 'Home', and 'Object Manager'. A search bar at the top right contains the placeholder 'Search Setup'. Below the header, a sidebar on the left lists 'Users' (with 'Permission Set Groups' and 'Permission Sets' selected), 'Custom Code', and 'Custom Permissions'. A message at the bottom of the sidebar says ' Didn't find what you're looking for? Try using Global Search.' The main content area has a title 'Permission Sets' with a 'Purchase Manager Create Access' card. The card includes fields for 'API Name' (set to 'Purchase\_Manager'), 'Namespace Prefix', 'Created By' (Nair Arjun Muridharan, 9/3/2025, 6:03 AM), and 'Last Modified By' (Nair Arjun Muridharan, 9/3/2025, 6:10 AM). Below the card is a section titled 'Apps' with several sub-sections: '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), 'Object Settings' (Permissions to access objects and fields, and settings such as tab availability), 'App Permissions' (Permissions to perform app-specific actions, such as "Manage Call Centers"), 'Apex Class Access' (Permissions to execute Apex classes), 'Visualforce Page Access' (Permissions to execute Visualforce pages), and 'External Data Source Access'.

Flows:-We created flow named Actual Delivery Date Update to update the actual delivery date.



**Apex Triggers:-** We created the trigger to calculate the Total amount on Order item.

Setup Home Object Manager

Apex Triggers

Apex Trigger Detail

Name	Code Coverage	sObject Type
CalculateTotalAmountTrigger	0% (01)	Order Item
Created By	Nair Arjun Murlidharan, 9/11/2025, 5:58 AM	Status
Namespace Prefix		Last Modified By

Help for this Page ?

Apex Trigger Version Settings Trace Flags

```

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);
}
  
```

**Apex Classes:-** We created Apex Handler class.

The screenshot shows the Salesforce Setup interface with the 'Apex Classes' search results. The 'Apex Classes' tab is selected. The page title is 'Apex Classes'. The class details for 'CalculateTotalAmountHandler' are shown, including its name, namespace prefix, created by 'Nair Arjun Muridharan' on 9/3/2025 at 6:55 AM, and status as Active with 0% code coverage. The class body contains the following Apex code:

```
1 public class CalculateTotalAmountHandler {  
2  
3  
4  
5     // Method to calculate the total amount for Purchase Orders based on related Order Items  
6  
7     public static void calculateTotal(List<Order_Item__c> newItems, List<Order_Item__c> oldItems, Boolean isInsert, Boolean isUpdate, Boolean isDelete, Boolean isUndelete) {  
8  
9  
10        // Collect Purchase Order IDs affected by changes in Order_Item__c records  
11        Set<Id> parentIds = new Set<Id>();  
12  
13        Set<Id> childIds = new Set<Id>();  
14  
15  
16        // For insert, update, and undelete scenarios  
17        if (isInsert || isUpdate || isUndelete) {  
18            for (Order_Item__c ordItem : newItems) {  
19                parentIds.add(ordItem.Purchase_Order__c);  
20            }  
21            for (Order_Item__c ordItem : oldItems) {  
22                parentIds.add(ordItem.Purchase_Order__c);  
23            }  
24        }  
25    }  
26}
```

**Reports:-** Creating Reports named Purchase Orders Click Start report and Complete Purchase Details Report.

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

**Report: Purchase Orders  
Purchase Orders based on Suppliers**

Total Records: 2 Total Order Count: 2 Total Total Order Cost: ₹3,200.00

Enable Field Editing

Supplier ID:  
SP001 (Blue dot)  
SP002 (Black dot)

Sum of Order Count

Supplier ID: Purchase Order: Purchase Order ID: Order Count: Total Order Cost:

SP001 (1)	PO001	1	₹2,200.00
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## Dashboards:- We created the Dashboard for the Medical Inventory Management.

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

**Dashboard  
Medical Inventory DashBoard**  
As of Sep 13, 2025, 8:39 AM | Viewing as Nair Arjun Muridharan

Refresh Edit Subscribe

Purchase Orders based on Suppliers

Supplier ID	Sum of Order Count
SP001	1
SP002	1

View Report (Purchase Orders based on ...) As of Sep 13, 2025, 8:39 AM

Complete Purchase Details Report

Supplier ID: SP002 (Blue dot)

View Report (Complete Purchase Details ...) As of Sep 13, 2025, 8:39 AM

# 3.FUNCTIONAL AND PERFORMANCE TESTING

## Performance Testing

Testing the Triggers to get the total amount in the Order Item

The screenshot shows a CRM application interface for a medical inventory system. The top navigation bar includes links for Home, Products, Purchase Orders, Order Items, Inventory Transactions, Suppliers, Reports, and Dashboards. A search bar is at the top right. The main content area displays an 'Order Item' record with the ID OID003. The 'Details' tab is selected, showing fields like Purchase Order ID (PO002), Amount (₹2,500.00), and Product Details (Product ID: anesthasia, Unit Price: ₹50.00). To the right, an 'Activity' sidebar shows no upcoming or overdue tasks. The bottom right corner of the main content area has a blue status bar.

## Validation Rule checking

The screenshot shows a CRM application interface for a medical inventory system. The top navigation bar includes links for Home, Products, Purchase Orders, Order Items, Inventory Transactions, Suppliers, Reports, and Dashboards. A search bar is at the top right. The main content area displays a 'New Purchase Order' dialog. In the 'Information' section, the 'Expected Delivery Date' field is highlighted in yellow, indicating an error. A tooltip message says: '∅ We hit a snag.' and 'Review the errors on this page.' with a list: '• The Expected Delivery Date should not exceed 7 days.' The dialog also shows fields for Purchase Order ID (P002), Supplier ID (SP002), Actual Delivery Date, Total Order Cost, and Owner (Nair Arjun Murlidharan). At the bottom are 'Cancel', 'Save & New', and 'Save' buttons.

# RESULTS:-

## Home page

Approvals

Use Approvals to manage approval submissions and approval work items.

Create Flow Approval Process    Settings

Manage All Pending Approval Submissions

Manage All Flow Approval Processes

Review My Approval Work Items

Manage My Approval Submissions

View the current status of your approval submissions, or

## Products Page

Products

Recently Viewed

Product ID

P001

P004

P003

P002

New Import Change Owner Assign Label

Search this list...

# Purchase Orders

This screenshot shows the 'Purchase Orders' list view. The top navigation bar includes links for Home, Products, Purchase Orders, Order Items, Inventory Transactions, Suppliers, Reports, and Dashboards. A search bar and various toolbar icons are also present. The main area displays a table with two items:

	Purchase Order ID
1	PO002
2	PO001

A 'Recently Viewed' section is visible on the left.

# Order items

This screenshot shows the 'Order Items' list view. The top navigation bar includes links for Home, Products, Purchase Orders, Order Items, Inventory Transactions, Suppliers, Reports, and Dashboards. A search bar and various toolbar icons are also present. The main area displays a table with three items:

	Order Item ID
1	OID003
2	OID002
3	OID001

A 'Recently Viewed' section is visible on the left.

# Inventory Transactions

The screenshot shows the 'Inventory Transactions' screen. At the top, there is a navigation bar with links for Home, Products, Purchase Orders, Order Items, Inventory Transactions (which is the active tab), Suppliers, Reports, and Dashboards. Below the navigation bar is a search bar labeled 'Search...' and a toolbar with various icons. A sidebar on the left shows a 'Recently Viewed' section with a single item, 'TN001'. The main content area displays a table with one row, showing the transaction ID 'TN001'.

1	TN001
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# Suppliers

The screenshot shows the 'Suppliers' screen. At the top, there is a navigation bar with links for Home, Products, Purchase Orders, Order Items, Inventory Transactions, Suppliers (which is the active tab), Reports, and Dashboards. Below the navigation bar is a search bar labeled 'Search...' and a toolbar with various icons. A sidebar on the left shows a 'Recently Viewed' section with two items, 'SP001' and 'SP002'. The main content area displays a table with two rows, showing the supplier IDs 'SP001' and 'SP002'.

1	SP001
2	SP002

# Reports

The screenshot shows the 'Reports' section of a web application. On the left, a sidebar lists categories: 'Recent', 'Reports' (selected), 'Recent', 'Created by Me', 'Private Reports', 'Public Reports', 'All Reports', 'Folders' (selected), 'All Folders', 'Created by Me', 'Shared with Me', 'Favorites' (selected), and 'All Favorites'. The main area displays a table of recent reports:

Report Name	Description	Folder	Created By	Created On	Subscribed
Purchase Orders based on Suppliers	Private Reports	Nair Arjun Murlidharan	9/3/2025, 7:37 AM	<input checked="" type="checkbox"/>	
Complete Purchase Details Report	Private Reports	Nair Arjun Murlidharan	9/3/2025, 7:46 AM	<input checked="" type="checkbox"/>	

At the top right, there are search, report creation, and folder creation buttons.

# Dashboards

The screenshot shows the 'Dashboards' section of the application. The sidebar is identical to the one in the Reports section. The main area displays a table of recent dashboards:

Dashboard Name	Description	Folder	Created By	Created On	Subscribed
Medical Inventory Dashboard	Private Dashboards	Nair Arjun Murlidharan	9/3/2025, 7:50 AM	<input checked="" type="checkbox"/>	

At the top right, there are search, dashboard creation, and folder creation buttons.

# **ADVANTAGES AND DISADVANTAGES OF MEDICAL INVENTORY MANAGEMENT:-**

## **ADVANTAGES:-**

- 1. Centralized Data** – All medical inventory, supplier, and transaction details are stored in Salesforce, easily accessible from anywhere.
- 2. Real-time Tracking** – Automatic updates to stock after each transaction prevent stockouts and overstocking.
- 3. Expiry & Low Stock Alerts** – Reduces wastage and ensures critical medicines are always available.
- 4. Integration with Accounts** – Suppliers and customers are directly linked, improving accountability.
- 5. Automation** – Formula fields, validation rules, and workflows reduce manual errors.
- 6. Reports & Dashboards** – Provides clear insights into sales, purchases, and inventory status for better decision-making.
- 7. Scalability** – Easily extendable to include new medicines, suppliers, or advanced automation.
- 8. Cloud-based** – No hardware dependency, accessible anytime with Salesforce security features.

## **DISADVANTAGES:-**

- 1. Initial Setup Complexity** – Customizing Salesforce objects, fields, and automation requires technical knowledge
- 2. Dependency on Internet** – As Salesforce is cloud-based, it needs a reliable internet connection.
- 3. Cost Factor** – Salesforce licensing and storage may be expensive for small clinics or pharmacies.

**4Learning Curve** – Users need training to effectively use reports, dashboards, and automation.

**5Customization Limits** – Some advanced features may require Apex coding or third-party apps.

## CONCLUSION

The Salesforce-based Medical Inventory Management System successfully demonstrates how CRM platforms can be customized beyond customer management to serve as a complete healthcare inventory solution. By integrating medicine management, transactions, suppliers, customers, and dashboards, the system ensures accuracy, efficiency, and reliability in handling medical stock. Despite minor challenges such as cost and setup complexity, the system provides long-term benefits including real-time monitoring, reduced wastage, improved supplier relations, and data-driven insights. Overall, this project proves the effectiveness of Salesforce as a scalable platform for building critical inventory solutions in the medical domain.