

CRM APPLICATION FOR Medical Inventory Management

College Name :VET INSTITUTE OF ARTS AND SCIENCE

College Code:65651

Team ID: NM2025TMID25753

Team Size: 5

Team Leader: AATHI HARIHARA D

Team member: SARAVANAKUMAR E

Team member: GOKULSK

Team member: BHARANIDHARAN K

Team member: YOKESHWARAN P

Medical Inventory Management

Creating Developer Account

Creating a developer org in salesforce.

1. Go to <https://developer.salesforce.com/signup>

- On the sign up form, enter the following details :

Sign up for your Developer Edition

A free Salesforce Platform environment with Agentforce and Data Cloud

First name	Last name
Aathi Hari Hara	D

Job title	Work email
Student	aathihariharad23aid@vietinstituteofarts.edu.vn

Company	Country/Region
VET Institute of Arts	India

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

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

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

I'm not a robot

- First name & Last name
- Email
- Role : Developer
- Company : College Name
- County : India
- Postal Code : pin code
- Username : should be a combination of your name and company

This need not be an actual email id, you can give anything in the format : username@organization.com

Click on sign me up after filling these.

Creating a Product Object

To create an object:

- From the setup page
- 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

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		9/12/2025	<input checked="" type="checkbox"/>
Product	Product2	Standard Object			
Product Attribute	ProductAttribute	Standard Object			
Product Attribute Set Product	ProductAttributeSetProduct	Standard Object			
Product Category Product	ProductCategoryProduct	Standard Object			
Product Consumption Schedule	ProductConsumptionSchedule	Standard Object			

The screenshot shows the Salesforce Setup interface for the Product object. The left sidebar lists various setup categories like Details, Fields & Relationships, Page Layouts, etc. The main content area is titled 'Fields & Relationships' and displays 12 items sorted by Field Label. The fields listed are:

Field Label	API Name	Type
Expected Delivery Date	Expected_Delivery_Date__c	Date
Expiry Date	Expiry_Date__c	Date
Last Modified By	LastModifiedById	Lookup(User)
Minimum Stock Level	Minimum_Stock_Level__c	Number(10, 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)
Transaction Type	Transaction_Type__c	Picklist
Unit Price	Unit_Price__c	Currency(16, 2)

The screenshot shows the specific details for the Product Id field within the Product object's setup. The left sidebar shows the 'Fields & Relationships' category is selected. The main content area is titled 'Product Id' and includes sections for 'Field Information' and 'Validation Rules'. The 'Field Information' section shows the field label 'Product Id', data type 'Text(80)', and other details like description and data owner. The 'Validation Rules' section indicates 'No validation rules defined.'

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

Creating a tab for Product Object

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

Action	Label	Tab Style	Description
Edit Del	Inventory Transactions	Alarm clock	
Edit Del	Order Items	Airplane	
Edit Del	Products	Stethoscope	
Edit Del	Purchase Orders	Airplane	
Edit Del	Suppliers	Alarm clock	

Fwd: Welcome to Salesforce: Recent | Purchase Order | Tabs | Salesforce - Student

orgfarm-fc3c82c5ca-dev-ed.lightning.force.com/lightning/setup/CustomTabs/page?address=%2F01rgK00000FZHy%2Fe%3FreURL%3D%252F01rgK00000FZHy%253Fset...

Setup Home Object Manager

Search Setup

Tab

Feature Settings

Analytics

Tableau

Tableau Embedding

Tableau UAF Claims Definition

User Interface

Console Settings

Loaded Console Tab Limit

Rename Tabs and Labels

Tabs

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

SETUP Tabs

Edit Custom Object Tab Products

Fill in the fields below to define the custom tab.

Custom Tab Definition Edit

Custom Object Tab Information

Tab Label: Product
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: [Empty Text Area]

Save Cancel

Fwd: Welcome to Salesforce: Recent | Purchase Order | Tabs | Salesforce - Student

orgfarm-fc3c82c5ca-dev-ed.lightning.force.com/lightning/setup/CustomTabs/page?address=%2F01rgK00000FZHy%3Fsetupid%3DCustomTabs...

Setup Home Object Manager

Search Setup

Tab

Feature Settings

Analytics

Tableau

Tableau Embedding

Tableau UAF Claims Definition

User Interface

Console Settings

Loaded Console Tab Limit

Rename Tabs and Labels

Tabs

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

SETUP Tabs

Custom Object Tab Products

Below is the information for the custom tab. Click Edit to change the custom tab.

Custom Tab Definition Detail

Tab Label: Product
Object: Product
Tab Style: Stethoscope

Splash Page Custom Link

Description: Aathi Hari Hara D, 9/10/2025, 1:56 AM

Created By: Aathi Hari Hara D, 9/10/2025, 1:56 AM

Modified By: Aathi Hari Hara D, 9/10/2025, 1:56 AM

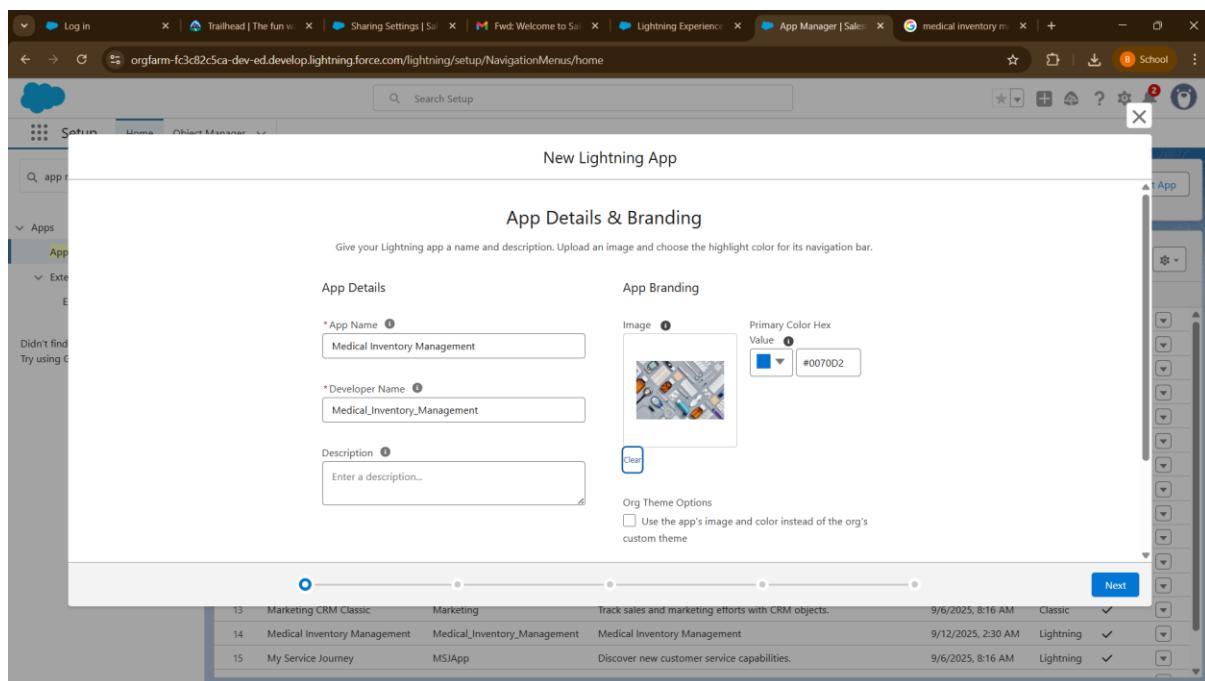
```
javascript:scrollUp('%27%2F01rgK00000FZHy%3Fsetupid%3DCustomTabs%26isdtp%3Dp1%27');
```

Creating Remaining Tabs

1. Now create the Tabs for the remaining Objects, they are “Purchase Order, Order Item, Inventory Transaction, Supplier”.
2. Follow the same steps as mentioned in Activity -1 .

Create a Lightning App for Medical Inventory Management

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



New Lightning App

Available Items Selected Items

Products

Purchase Orders
Order Items
Inventory Transactions
Suppliers
Reports
Dashboards
Products

Back Next

13 Marketing CRM Classic Marketing Track sales and marketing efforts with CRM objects.
9/6/2025, 8:16 AM Classic ✓
14 Medical Inventory Management Medical_Inventory_Management Medical Inventory Management
9/12/2025, 2:30 AM Lightning ✓
15 My Service Journey MSIApp Discover new customer service capabilities.
9/6/2025, 8:16 AM Lightning ✓

New Lightning App

Available Profiles Selected Profiles

System Administrator

Save & Finish

Creating a Text Field in Product Object

To create fields in an 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 screenshot shows the Salesforce Object Manager page. At the top, there's a navigation bar with tabs for Setup, Home, and Object Manager. The main area is titled "Object Manager" and displays a list of 150+ items, sorted by Label. The list includes various standard and custom objects such as Price Book Entry, Privacy RTBF Request, Problem, Problem Related Item, Process Exception, Product, Product2, Product Attribute, Product Attribute Set Product, Product Category Product, Product Consumption Schedule, Promotion, Promotion Market Segment, and Promotion Qualifier. Each item in the list has three columns: Label, API Name, and Object Type. A "Create" button is located at the top right of the list area.

Label	API Name	Object Type
Price Book Entry	PricebookEntry	Standard Object
Privacy RTBF Request	PrivacyRTBFRequest	Standard Object
Problem	Problem	Standard Object
Problem Related Item	ProblemRelatedItem	Standard Object
Process Exception	ProcessException	Standard Object
Product	Product_c	Custom Object
Product	Product2	Standard Object
Product Attribute	ProductAttribute	Standard Object
Product Attribute Set Product	ProductAttributeSetProduct	Standard Object
Product Category Product	ProductCategoryProduct	Standard Object
Product Consumption Schedule	ProductConsumptionSchedule	Standard Object
Promotion	Promotion	Standard Object
Promotion Market Segment	PromotionMarketSegment	Standard Object
Promotion Qualifier	PromotionQualifier	Standard Object

Fwd: Welcome to Salesforce: Recent | Purchase Order | Product | Salesforce - Student

orgfarm-fc3c82c5ca-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01gK00000289BR/FieldsAndRelationships/view

Setup Home Object Manager

Search Setup

Product

SETUP > OBJECT MANAGER

Fields & Relationships

12 Items, Sorted by Field Label

Expected Delivery Date	Expected_Delivery_Date__c	Date	
Expiry Date	Expiry_Date__c	Date	
Last Modified By	LastModifiedById	Lookup(User)	
Minimum Stock Level	Minimum_Stock_Level__c	Number(10, 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)	
Transaction Type	Transaction_Type__c	Picklist	
Unit Price	Unit_Price__c	Currency(16, 2)	

Fwd: Welcome to Salesforce: Recent | Purchase Order | Product | Salesforce - Student

orgfarm-fc3c82c5ca-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01gK00000289BR/FieldsAndRelationships/00Ngk00001td6w/view

Setup Home Object Manager

Search Setup

Product

SETUP > OBJECT MANAGER

Fields & Relationships

Custom Field Definition Detail

Back to Product

Validation Rules

Edit Set Field-Level Security View Field Accessibility Where is this used?

Field Information

Field Label	Product Name	Object Name	Product
Field Name	Product_Name	Data type	Text
API Name	Product_Name__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			

Created By Aathi Hari Hara D. 9/12/2025, 2:33 AM Modified By Aathi Hari Hara D. 9/12/2025, 2:33 AM

General Options

Required	<input checked="" type="checkbox"/>
Unique	<input type="checkbox"/>
Case Sensitive	<input type="checkbox"/>
External ID	<input type="checkbox"/>
Default Value	

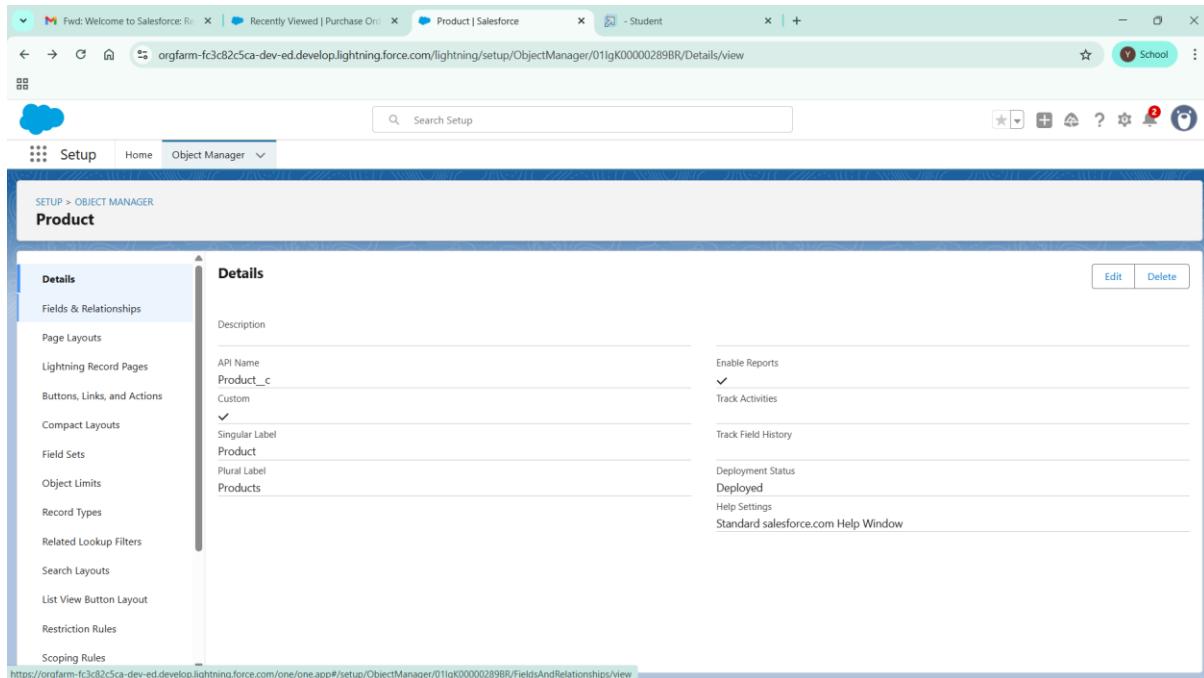
Text Options

Length	255
--------	-----

Creating a TextArea Field in Product Object

To create fields in an 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 TextArea field, click Next
7. Enter Field Label as “Product Description” .
8. Click Next, Next, then Save & New.



Fwd: Welcome to Salesforce: Recent | Purchase Order | Product | Salesforce - Student

orgfarm-fc3c82c5ca-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01gK00000289BR/FieldsAndRelationships/view

Setup Home Object Manager

Search Setup

SETUP > OBJECT MANAGER Product

Fields & Relationships 12 Items, Sorted by Field Label

Expected Delivery Date	Expected_Delivery_Date__c	Date	
Expiry Date	Expiry_Date__c	Date	
Last Modified By	LastModifiedById	Lookup(User)	
Minimum Stock Level	Minimum_Stock_Level__c	Number(10, 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)	
Transaction Type	Transaction_Type__c	Picklist	
Unit Price	Unit_Price__c	Currency(16, 2)	

Fwd: Welcome to Salesforce: Recent | Purchase Order | Product | Salesforce - Student

orgfarm-fc3c82c5ca-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01gK00000289BR/FieldsAndRelationships/00NgK00001u8df/view

Setup Home Object Manager

Search Setup

SETUP > OBJECT MANAGER Product

Product Custom Field Product Description Back to Product

Custom Field Definition Detail

Help for this Page

Field Information

Field Label	Product Description	Object Name	Product
Field Name	Product_Description	Data Type	Text Area
API Name	Product_Description__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			

Created By Aathi Hari Hara D. 9/12/2025, 2:39 AM Modified By Aathi Hari Hara D. 9/12/2025, 2:39 AM

General Options

Required Default Value

Validation Rules

New Validation Rules Help

Creating a Number Field in Product object

To create fields in an object:

1. Go to setup >> click on Object Manager >> type object name(Product) in quick find box >> click on the Product custom object.
2. Now click on “Fields & Relationships”
3. Click on New.
4. Select Data type as “Number” and click Next.
5. Enter Field Label as “ Current Stock Level”.
6. Length - 18, Decimal Places - 0.
7. Click on Next, Next and Save.

The screenshot shows the Salesforce Setup interface. The top navigation bar includes tabs for Fwd: Welcome to Salesforce!, Recently Viewed, Purchase Order, Product | Salesforce, and a student profile. Below the navigation is a toolbar with icons for Home, Object Manager, Search, and various system functions. The main content area is titled 'SETUP > OBJECT MANAGER' and shows the 'Product' object details. On the left, a sidebar lists various configuration options like 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 right pane displays the 'Custom Field Definition Detail' for a field named 'Current Stock Level'. The 'Field Information' section shows the field label 'Current Stock Level', field name 'Current_Stock_Level', API name 'Current_Stock_Level__c', and data type 'Number'. It also shows the object name 'Product' and the user who created it, Aathi Hari Hara D., on 9/10/2025, 8:01 AM. The 'General Options' section includes checkboxes for Required, Unique, External ID, AI Prediction, and Default Value. At the bottom, there are tabs for Validation Rules, Set Field-Level Security, View Field Accessibility, and Where is this used?.

Creating a Currency Field in Product object

To create fields in an object:

1. Go to setup >> click on Object Manager >> type object name(Product) in quick find box >> click on the Product custom object.
2. Now click on “Fields & Relationships”

3. Click on New.
4. Select Data type as “Currency” and click Next.
5. Enter Field Label as “ Unit Price”.
6. Length - 16, Decimal Places - 2.
7. Select Required Field.
8. Click on Next, Next and Save.

The screenshot shows the Salesforce Setup interface for creating a custom field. The main title is "Product Custom Field Unit Price". The "Field Information" section includes:

- Field Label:** Unit Price
- Field Name:** Unit_Price
- API Name:** Unit_Price_c
- Description:** (empty)
- Help Text:** (empty)
- Data Owner:** (empty)
- Field Usage:** (empty)
- Data Sensitivity Level:** (empty)
- Compliance Categorization:** (empty)

On the right side, it shows the Object Name as **Product** and Data Type as **Currency**. The "General Options" section has "Required" checked. The "Currency Options" section shows Length as 16 and Decimal Places as 2. The "Custom Field Definition Detail" section includes tabs for **Edit**, **Set Field Level Security**, **View Field Accessibility**, and **Where is this used?**.

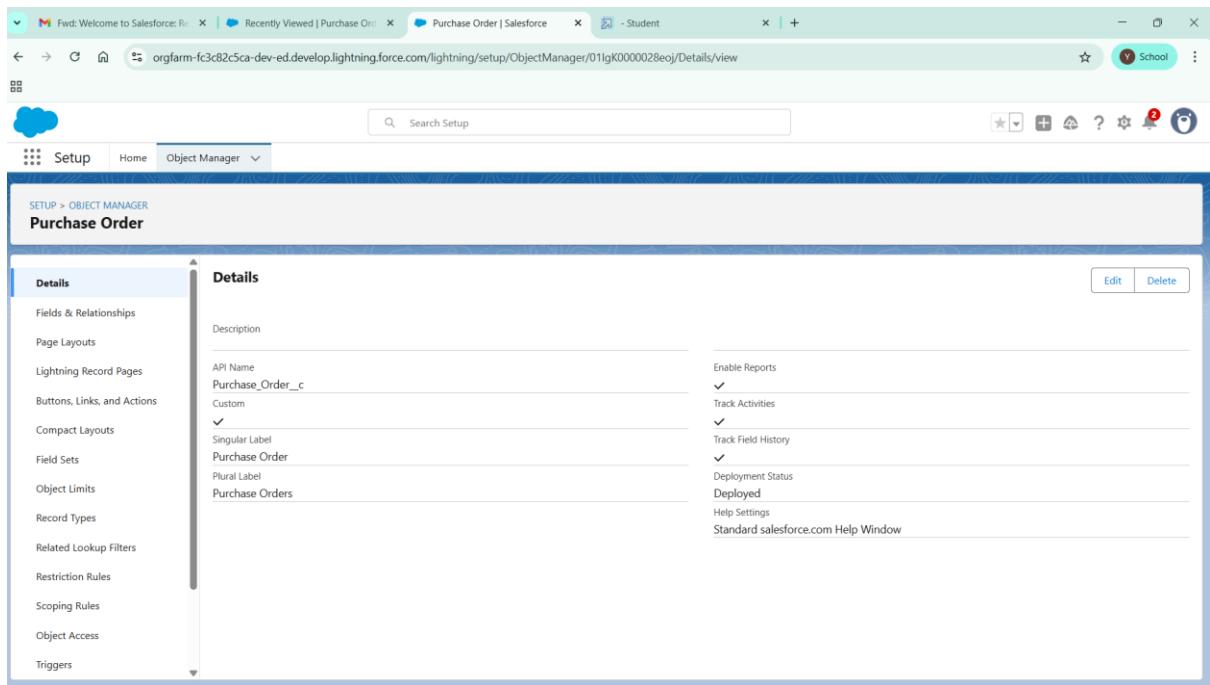
Creating Lookup Relationship in Purchase Order Object

A Lookup relationship is a type of relationship in Salesforce that connects two objects together based on a field known as the Lookup field. It establishes a relationship between a child object and a parent object, allowing the child object to reference the parent object.

To Create a relationship from Purchase Order to Supplier .

1. Go to the Setup page >> click on Object manager >> type object name(Purchase Order) in the quick find bar >> click on the Purchase Order object.
2. Click on Fields & Relationship
3. Click on New.

4. Select “Lookup relationship” as data type and click Next.
5. Select the related object “ Supplier”.
6. Click on Next.
7. Give Field Label as “Supplier ID” .
8. Select Required Field.
9. Click on Next , Next, Next , Save.



The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes tabs for Fwd: Welcome to Salesforce, Recently Viewed, Purchase Order, and - Student. A search bar labeled "Search Setup" is at the top right. The main area is titled "SETUP > OBJECT MANAGER" and "Purchase Order". On the left, a sidebar lists various configuration options: 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, and Triggers. The main content area is titled "Details" and contains sections for "Description", "API Name" (set to "Purchase_Order_c"), "Custom" (with a checked checkbox), "Singular Label" (set to "Purchase Order"), "Plural Label" (set to "Purchase Orders"), and "Enable Reports" (with a checked checkbox). There are also sections for "Track Activities", "Track Field History", "Deployment Status" (set to "Deployed"), and "Help Settings". At the bottom right of the main content area are "Edit" and "Delete" buttons.

Fwd: Welcome to Salesforce: Recently Viewed | Purchase Order | Purchase Order | Salesforce - Student

orgfarm-fc3c82c5ca-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01gK0000028eoj/FieldsAndRelationships/view

Setup Home Object Manager

Search Setup

FIELDS & RELATIONSHIPS

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 Restriction Rules Scoping Rules Object Access Triggers

Fields & Relationships
8 items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Actual Delivery Date	Actual_Delivery_Date__c	Date/Time		
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Order Date	Order_Date__c	Date		
Product	Product__c	Master-Detail(Product)	✓	▼
Purchase Order Name	Name	Text(80)	✓	▼
Supplier ID	Supplier_ID__c	Lookup(Supplier)	✓	▼
Total Order Cost	Total_Order_Cost__c	Currency(10, 2)		▼

Fwd: Welcome to Salesforce: Recently Viewed | Purchase Order | Purchase Order | Salesforce - Student

orgfarm-fc3c82c5ca-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01gK0000028eoj/FieldsAndRelationships/00NgK00001v5in/view

Setup Home Object Manager

Search Setup

DETAILS

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 Restriction Rules Scoping Rules Object Access Triggers

Purchase Order Custom Field Supplier ID
Back to Purchase Order

Custom Field Definition Detail

Help for this Page

Field Information

Field Label	Supplier ID	Object Name	Purchase Order
Field Name	Supplier_ID	Data Type	Lookup
API Name	Supplier_ID__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			

Created By Aathi Hari Hara D. 9/12/2025, 2:52 AM Modified By Aathi Hari Hara D. 9/12/2025, 2:52 AM

Lookup Options

Related To	Supplier	Child Relationship Name	Purchase_Orders
Related List Label	Purchase Orders		
Required	✓		

What to do if the lookup record is deleted? Don't allow deletion of the lookup record that's part of a lookup relationship.

Lookup Filter

No lookup filters defined.

Creating a Date Field in Purchase Order object

To create fields in an 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. Now click on “Fields & Relationships”
3. Click on New.
4. Select Data type as “Date” and click Next.
5. Enter Field Label as “ Order Date”.
6. Click on Next, Next and Save.

The screenshot shows the Salesforce Setup interface with the following details:

- Page Header:** Fwd: Welcome to Salesforce: Ri, Recently Viewed | Purchase Order, Purchase Order | Salesforce, - Student
- Search Bar:** Search Setup
- Top Navigation:** Setup, Home, Object Manager
- Left Sidebar:** Fields & Relationships (selected), Details, 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.
- Current Page:** SETUP > OBJECT MANAGER
Purchase Order
- Field Definition Detail:** Purchase Order Custom Field
Order Date
Back to Purchase Order
- Custom Field Definition Detail:** Validation Rules
- Field Information:** Field Label: Order Date, Field Name: Order_Date, API Name: Order_Date__c, Description: Help Text, Data Owner: Field Usage, Data Sensitivity Level: Compliance Categorization, Created By: Aathi Hari Hara D, 9/10/2025, 11:06 PM, Object Name: Purchase_Order, Object Type: Date, Modified By: Aathi Hari Hara D, 9/10/2025, 11:06 PM.
- General Options:** Required: , Default Value: [empty]
- Validation Rules:** No validation rules defined.

Creating a Roll-Up Summary Field in Purchase Order object

To create fields in an 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. Now click on “Fields & Relationships”
3. Click on New.
4. Select Data type as “Roll-Up Summary” and click Next.
5. Enter Field Label as “ Order Count”.
6. Choose the Summarized Object as “Order Items”.
7. For Select Roll-Up Type select “Count”.
8. Click on Next, Next and Save.

Creating a Unit Price Formula Field in Order Item object

To create fields in an object:

1. Go to setup >> click on Object Manager >> type object name(Order Item) in quick find box >> click on the Order Item object.
2. Now click on “Fields & Relationships”
3. Click on New.
4. Select Data type as “Formula” and click Next.
5. Enter field label Unit Price.
6. Select formula return type Currency, Click Next
7. Create and insert Advance formula: Product_ID__r.Unit_Price__c
8. Click Next, Next, then Save.

The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes tabs for Setup, Home, and Object Manager, with Object Manager currently selected. The main content area displays the 'Order Item' object details. On the left, a sidebar lists various configuration options under 'Fields & Relationships'. The right pane shows the 'Custom Field Definition Detail' for a field named 'Unit Price'. The 'Field Information' section shows the field label 'Unit Price', field name 'Unit_Price', and API name 'Unit_Price__c'. The 'Formula Options' section shows the data type as 'Formula' and the formula as 'Product_ID__r.Unit_Price__c'. The 'Object Name' is listed as 'Order Item'. The page also includes standard Salesforce navigation and search tools.

Creating a Amount Formula Field in Order Item object

To create fields in an object:

1. Go to setup >> click on Object Manager >> type object name(Order Item) in quick find box >> click on the Order Item object.
2. Now click on “Fields & Relationships”
3. Click on New.
4. Select Data type as “Formula” and click Next.
5. Enter field label Amount.
6. Select formula return type Currency, Click Next
7. Create and insert Advance formula: `Quantity_Received__c * Unit_Price__c`
8. Click Next, Next, then Save.

The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes tabs for Fwd: Welcome to Salesforce!, Recently Viewed, Purchase Order, Order Item (selected), and Student. The URL is orgfarm-fc3c82c5ca-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01lgK000002AVe5/FieldsAndRelationships/00NgK00001jzbx/view. The main area displays the 'Object Manager' page for 'Order Item'. On the left, a sidebar lists various setup options like Details, Fields & Relationships (selected), 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, and Triggers. The main content area shows the 'Custom Field Definition Detail' for a field named 'Amounts' under 'Order Item Custom Field'. The 'Field Information' section shows the field label 'Amounts', field name 'Amounts__c', API name 'Amounts__c', and a formula defined as 'Quantity_Received__c * Unit_Price__c'. The 'Formula Options' section shows the data type as 'Currency' and decimal places as '2'. The 'Object Name' is listed as 'Order Item'. The 'Created By' and 'Modified By' fields both show 'Aathi Hari Hara D.' with the timestamp '9/12/2025, 10:05 AM'.

Creating a Picklist Field in Inventory Transaction Object

To create fields in an object:

1. Go to setup >> click on Object Manager >> type object name(Inventory Transaction) in quick find box>> click on the Inventory Transaction Object.
2. Now click on “Fields & Relationships” .
3. Click on New.
4. Select Data type as “Picklist” and click Next.
5. Enter Field Label as “Transaction Type”.
6. In values select “Enter values, with each value separated by a new line” and enter values as shown below.

Receipt

Issue

Adjustment

7. Click on Next, Next and Save.

The screenshot shows the Salesforce Setup interface with the following details:

- Page Header:** Fwd: Welcome to Salesforce; Recently Viewed | Purchase Order; Inventory Transaction | Salesforce - Student
- Search Bar:** Search Setup
- Navigation:** Setup Home Object Manager
- Current Page:** SETUP > OBJECT MANAGER Inventory Transaction
- Custom Field Definition Detail:**
 - Field Information:** Field Label: Transaction Type, Field Name: Transaction_Type, API Name: Transaction_Type_c, Description: (empty), Help Text: (empty), Data Owner: (empty), Field Usage: (empty), Data Sensitivity Level: (empty), Compliance Categorization: (empty). Object Name: Inventory_Transaction, Data Type: Picklist.
 - General Options:** Required: , Default Value: (empty).
 - Picklist Options:** Restrict picklist to the values defined in the value set: , Controlling Field: [New].
- Left Sidebar:** Details, Fields & Relationships (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, Scoping Rules.

Creating a Total Order Cost Formula Field in Inventory Transaction object

To create fields in an object:

1. Go to setup >> click on Object Manager >> type object name(Inventory Transaction) in quick find box >> click on the Order Item object.
2. Now click on “Fields & Relationships”
3. Click on New.
4. Select Data type as “Formula” and click Next.
5. Enter field label Total Order Cost.
6. Select formula return type Currency, Click Next
7. Create and insert Advance formula: Purchase_Order_ID__r.Total_Order_Cost__c
8. Click Next, Next, then Save.

Creating a Phone Field in Supplier object

To create fields in an object:

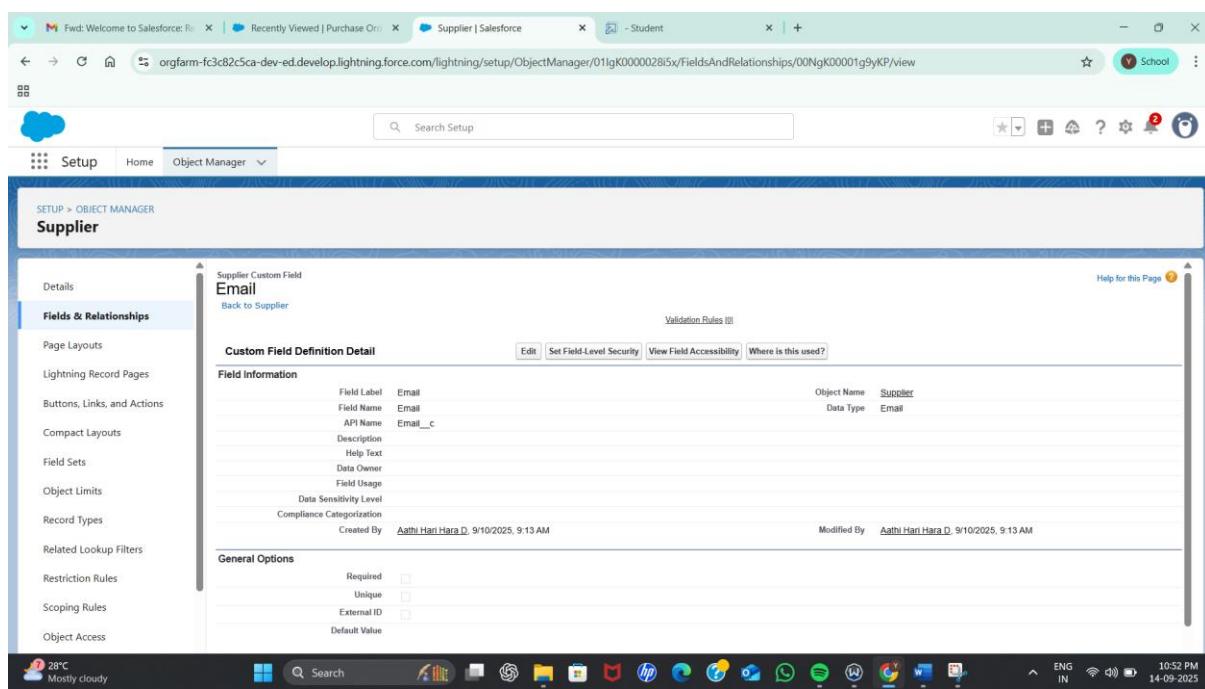
1. Go to setup >> click on Object Manager >> type object name(Supplier) in quick find box>> click on the Supplier object.
2. Now click on “Fields & Relationships”
3. Click on New.
4. Select Data type as “Phone” and click Next.
5. Enter the Field Label as “ Phone Number”.
6. Select Required Field.
7. Click on Next, Next and Save.

The screenshot shows the Salesforce Setup interface for creating a custom field. The URL in the browser is <https://orgfarm-fc3c82c5ca-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01lgK0000028i5x/FieldsAndRelationships/00NgK00001g9eOh/view>. The page title is "Supplier | Salesforce". The left sidebar shows navigation options like 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, Restriction Rules, Scoping Rules, Object Access, and Triggers. The main content area displays the "Supplier Custom Field" named "Phone Number". It includes sections for "Custom Field Definition Detail", "Field Information", "General Options", and "Validation Rules". The "Field Information" section shows the field label "Phone Number", field name "Phone_Number", API name "Phone_Number__c", object name "Supplier", and data type "Phone". The "General Options" section has "Required" checked. The "Validation Rules" section indicates "No validation rules defined".

Creating a Email Field in Supplier object

To create fields in an object:

1. Go to setup >> click on Object Manager >> type object name(Supplier) in quick find box>> click on the Supplier object.
2. Now click on “Fields & Relationships”
3. Click on New.
4. Select Data type as “Email” and click Next.
5. Enter the Field Label as “ Email”.
6. Click on Next, Next and Save.



To edit 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.

The screenshot shows the Salesforce Setup interface. The top navigation bar includes links for Fwd: Welcome to Salesforce, Recently Viewed, Purchase Order, Product | Salesforce, and a Student tab. The main title is "SETUP > OBJECT MANAGER Product". On the left, a sidebar lists various configuration options under "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 central area displays the "Page Layouts" section with one item listed:

PAGE LAYOUT NAME	CREATED BY	MODIFIED BY
Product Layout	Aathi Hari Hara D, 9/10/2025, 1:49 AM	Aathi Hari Hara D, 9/12/2025, 10:23 AM

Below this, there is a "Layout Properties" section for the "Product Layout". It includes fields for "Section", "Blank Space", "Expected Delivery...", "Expiry Date", "Owner", "Product Description", "Transaction Type", "Created By", "Last Modified By", "Product Id", "Current Stock Level", "Minimum Stock Level", and "Product Name".

The second screenshot shows the "Edit" screen for the "Product Layout". The top navigation bar and sidebar are identical to the first screenshot. The main title is "SETUP > OBJECT MANAGER Product". The left sidebar shows the same list of configuration options. The central area displays the "Product Detail" section, which includes fields for "Information", "System Information", "Custom Links", and "Mobile Cards (Salesforce mobile only)". The "Information" section contains fields for Product Id, Product Name, Product Description, Expected Delivery Date, Unit Price, Minimum Stock Level, Current Stock Level, Owner, and Expiry Date. The "System Information" section contains fields for Created By, Last Modified By, and Sample Text. The "Custom Links" section contains a link labeled "Mobile Cards (Salesforce mobile only)".

To edit a Page Layout in 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 >> Page Layouts.
2. Click on the Purchase Order Layout
3. Drag and Arrange the field as shown below

The screenshot shows the Salesforce Object Manager interface for the Purchase Order object. The left sidebar has a 'Page Layouts' section selected. The main area displays a table titled 'Page Layouts' with one item: 'Purchase Order Layout'. The table has columns for 'PAGE LAYOUT NAME', 'CREATED BY', and 'MODIFIED BY'. The 'Purchase Order Layout' was created by 'Aathi Hari Hara D.' on 9/10/2025 at 8:11 AM, and last modified by 'Aathi Hari Hara D.' on 9/12/2025 at 10:29 AM. There are 'Quick Find', 'New', and 'Page Layout Assignment' buttons at the top right of the table.

4. Click on field Order Date >> click on settings >> select Required and save it.
5. Click on field Total Order Cost >> click on settings >> select Read Only and save it.
6. Click Save.

The screenshot shows the Purchase Order Page Layout editor. The left sidebar has a 'Page Layouts' section selected. The main area shows the 'Purchase Order Detail' section with various fields like Purchase Order Name, Supplier ID, Order Date, Total Order Cost, Actual Delivery Date, Product, and Purchase Order Name. Above the fields, there is a 'Layout Properties' tab with 'Fields' and 'Buttons' sections. The 'Fields' section lists Order Date, Total Order Cost, Actual Delivery Date, and Product, with Order Date set to 'Required' and Total Order Cost set to 'Read Only'. Below the fields, there are sections for 'Information', 'System Information', 'Custom Links', and 'Mobile Cards'.

To edit a Page Layout in Order Item Object

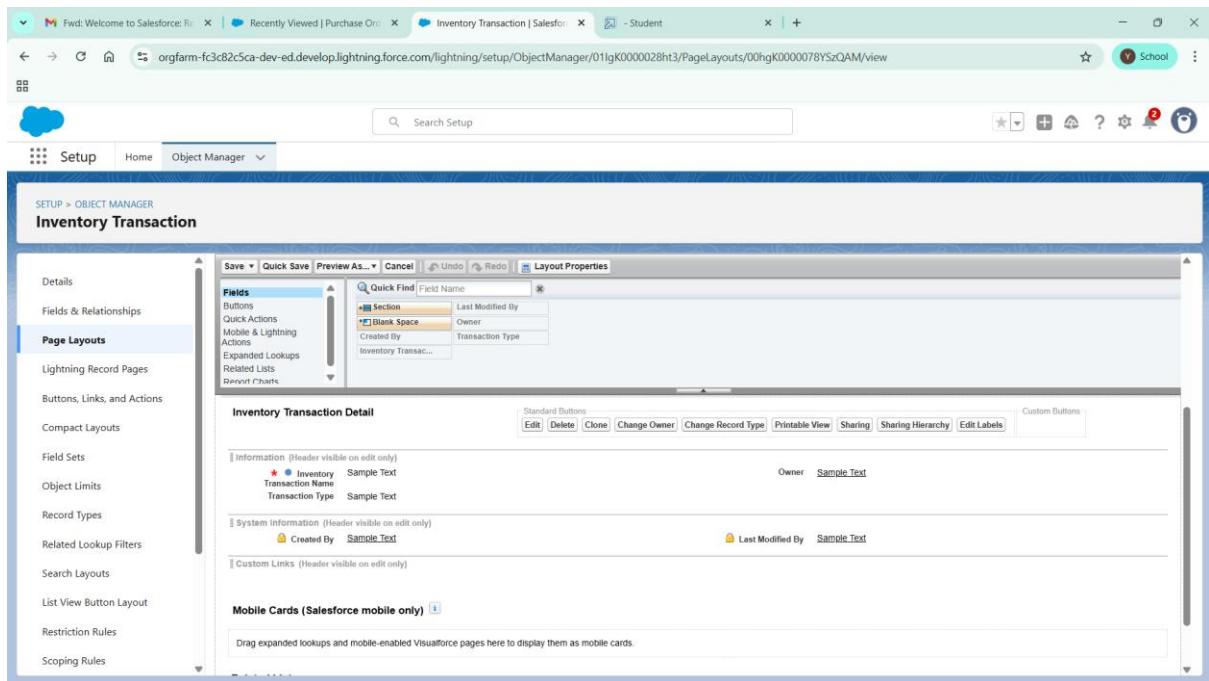
1. Go to setup >> click on Object Manager >> type object name(Order Item) in quick find box >> click on the Order Item object >> Page Layouts.
2. Click on the Order Item Layout
3. Drag and Arrange the field as shown below

The screenshot shows the Salesforce Object Manager interface for the Order Item object. The left sidebar has 'Page Layouts' selected. The main area displays the 'Order Item Detail' layout. At the top, there's a 'Fields' section with a 'Quick Find' bar and a table showing fields like 'Product_ID', 'Unit Price', 'Created By', 'Last Modified By', etc. Below this is the 'Order Item Detail' section, which includes sections for 'Information', 'System Information', and 'Mobile Cards (Salesforce mobile only)'. The 'Information' section contains fields for 'Order Item Name', 'Order', 'Amount', and 'Quantity Received'. The 'System Information' section shows 'Created By' and 'Last Modified By'. The 'Mobile Cards' section is currently empty. Standard buttons for Edit, Delete, Clone, Change Record Type, Printable View, and Edit Labels are at the bottom of the detail section.

4. Click Save.

To edit a Page Layout in Inventory Transaction Object

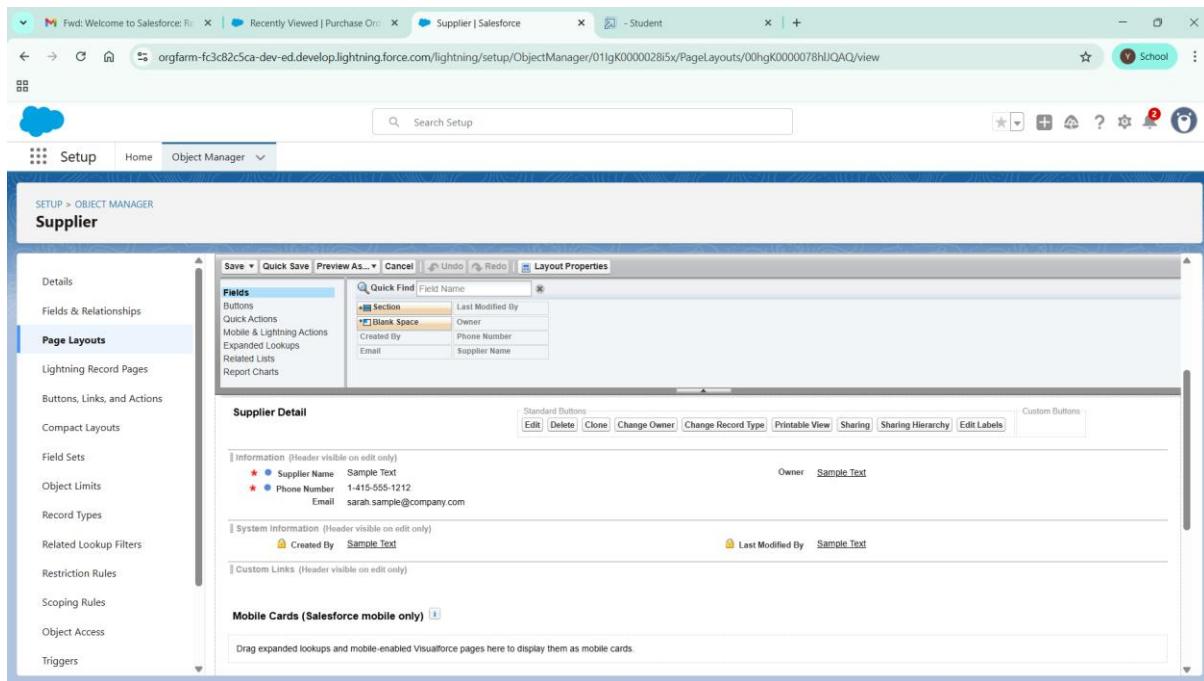
1. Go to setup >> click on Object Manager >> type object name(Inventory Transaction) in quick find box >> click on the Inventory Transaction object >> Page Layouts.
2. Click on the Inventory Transaction Layout
3. Drag and Arrange the field as shown below



4. Click Save.

To edit a Page Layout in Supplier Object

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



4. Click Save.

To create 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 Setup interface for creating a compact layout for the Product object. The left sidebar is collapsed, and the main area displays the 'Compact Layout Detail' for 'Product Compact Layout'. The layout includes fields for Label (Product Compact Layout), API Name (Product_Compact_Layout), and Included Fields (Unit Price, Current Stock Level). The 'Object Name' is set to 'Product'. The 'Created By' field shows 'Aathi Hari Hara D.' and the 'Modified By' field also shows 'Aathi Hari Hara D.' with the timestamp '9/10/2025, 10:08 AM'. There are 'Edit', 'Clone', 'Delete', and 'Compact Layout Assignment' buttons at the top right of the detail card.

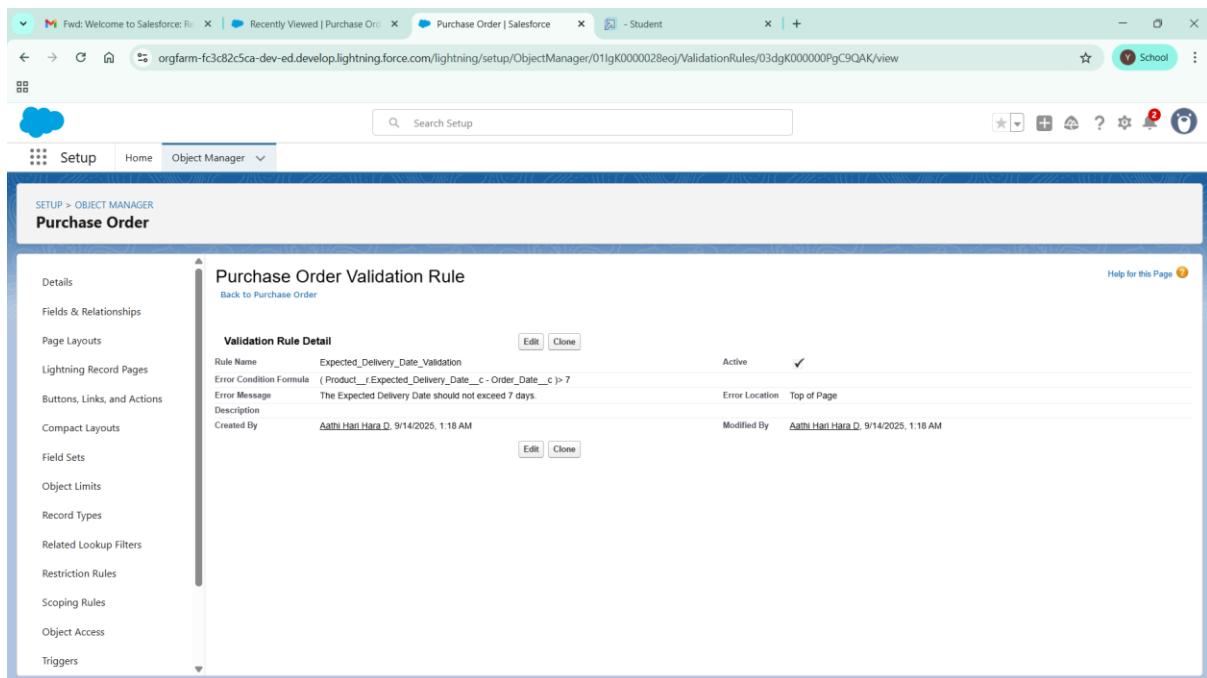
To create a Compact Layout to a Purchase Order Object

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 Compact Layouts in the sidebar .
3. Click on New.
4. Enter the Label as “Purchase Order Compact Layout”.
5. Select the Compact Layout Fields : Select Purchase Order ID, Order Date, Total Order Cost, Supplier ID.
6. Click Save.
7. Click Compact Layout Assignment.
8. Click Edit Assignment.
9. Choose "Purchase Order Compact Layout" from the dropdown.
10. Click Save.

The screenshot shows the Salesforce Setup interface for creating a compact layout for the Purchase Order object. The left sidebar is expanded to show various configuration options like Details, Fields & Relationships, Page Layouts, and Compact Layouts. The Compact Layouts section is selected, and a new layout named 'Purchase Order Compact Layout' is being edited. The layout detail page shows the label 'Purchase Order Compact Layout', API name 'Purchase_Order_Compact_Layout', and included fields: Purchase Order Name, Order Date, Total Order Cost, and Supplier ID. The object name is set to 'Purchase Order'. The layout was created by 'Aathi Hari Hara D' on 9/14/2025 at 1:13 AM and modified by the same user on the same date and time. Navigation links include 'Edit', 'Clone', 'Delete', and 'Compact Layout Assignment'.

To create an Expected Delivery Date Validation rule to a Employee 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 :
 $(\text{Expected_Delivery_Date_c} - \text{Order_Date_c}) > 7$



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.

To create an Inventory Manager Profile

1. Go to setup >> type profiles in quick find box >> click on profiles >> clone the desired profile (Standard User) >> enter profile name (Inventory Manager) >> Save.

The screenshot shows the Salesforce Setup interface with the 'Profiles' page selected. The page header includes tabs for 'Setup', 'Home', and 'Object Manager'. A search bar at the top right contains the text 'Search Setup'. Below the header, there's a sidebar with 'Users' and 'Profiles' sections. The main content area is titled 'Profiles' and shows a table with the following data:

Action	Profile Name	User License	Custom
<input type="checkbox"/> Edit Del ...	Salesforce API Only System Integrations	Salesforce Integration	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit Clone	Silver Partner User	Silver Partner	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Solution Manager	Salesforce	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Standard Platform User	Salesforce Platform	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Standard User	Salesforce	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	System Administrator	Salesforce	<input type="checkbox"/>

At the bottom of the page, there are navigation links for '1-6 of 6' and 'Selected', and a 'Page 1 of 1' indicator.

2. While still on the profile page, then click Edit.
3. Select the Custom App settings as default for the Medical Inventory Management.

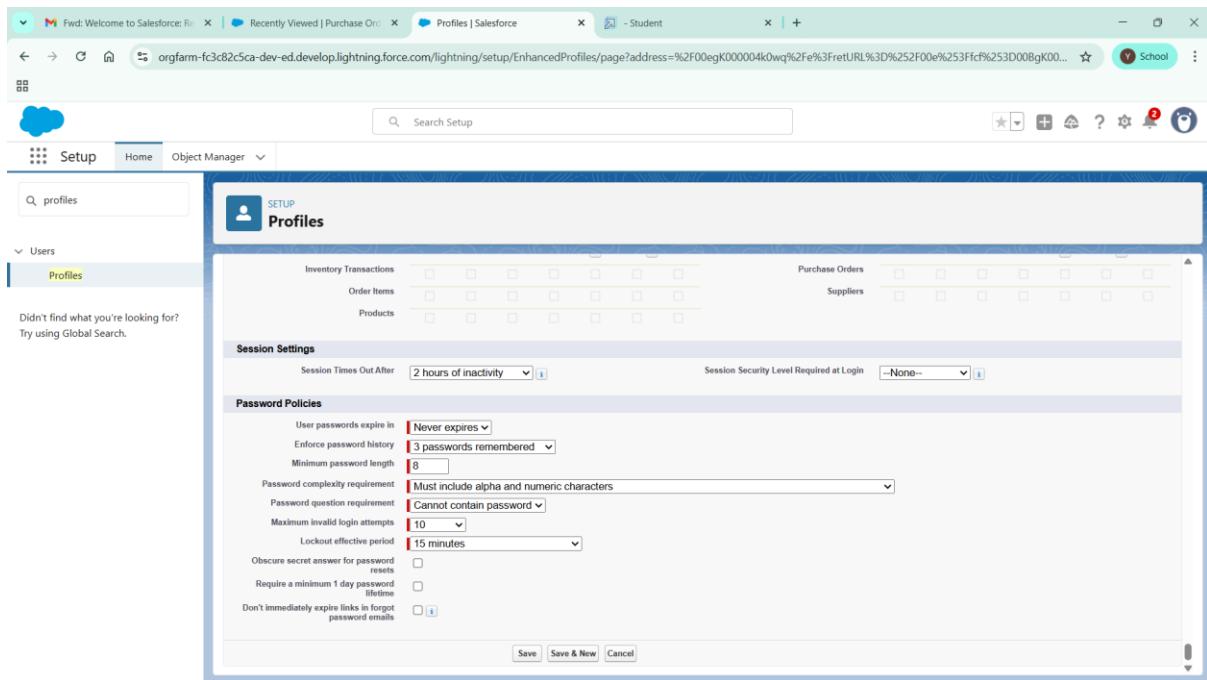
The screenshot shows the 'Custom App Settings' section of the Profiles page. This section allows users to manage the visibility and default status of various Salesforce applications. The applications listed include:

- All Tabs (standard__AllTabSet)
- Analytics Studio (standard__Insights)
- App Launcher (standard__AppLauncher)
- Approvals (standard__Approvals)
- Automation (standard__FlowsApp)
- Bolt Solutions (standard__LightningBolt)
- Community (standard__Community)
- Content (standard__Content)
- Data Cloud (standard__Audience360)
- Data Manager (standard__DataManager)
 - Digital Experiences (standard__SalesforceCMS)
 - Lightning Usage App (standard__LightningInstrumentation)
 - Marketing CRM Classic (standard__Marketing)
 - Medical Inventory Management (Medical_Inventory_Management)
 - Medical Inventory Management (Medical_Inventory_Managements)
- My Service Journey (standard__MSJApp)
- Queue Management (standard__QueueManagement)
- Sales (standard__LightningSales)
- Sales (standard__Sales)
- Sales Cloud Mobile (standard__SelectCloudMobile)
- Sales Console (standard__LightningConsole)
- Salesforce Chatter (standard__Chatter)
- Salesforce Scheduler Setup (standard__LightningScheduler)
- Sample Console (standard__ServiceConsole)
- Service (standard__Service)
- Service Console (standard__LightningService)
- Sites (standard__Sites)
- Subscription Management (standard__RevenueCloudConsole)
- WDC (standard__Work)

A blue selection bar highlights the 'Medical Inventory Management' application under the Data Manager section.

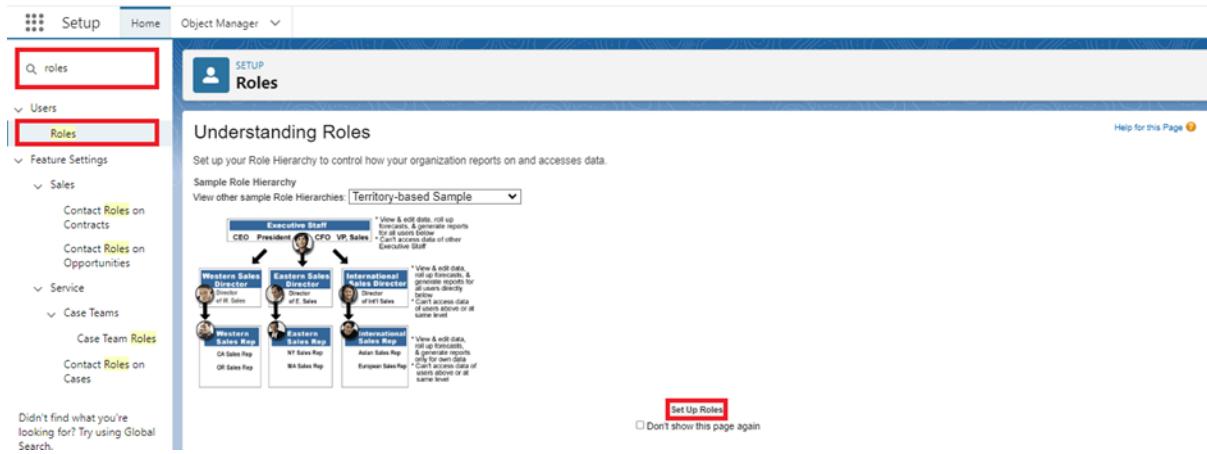
4. Scroll down to Custom Object Permissions and Give access permissions as mentioned in the below diagram.
5. Change the password policies as mentioned :
6. User passwords expire in should be “ never expires ”.

7. Minimum password length should be “ 8 ”, and click save.



Create a Purchasing Manager Role.

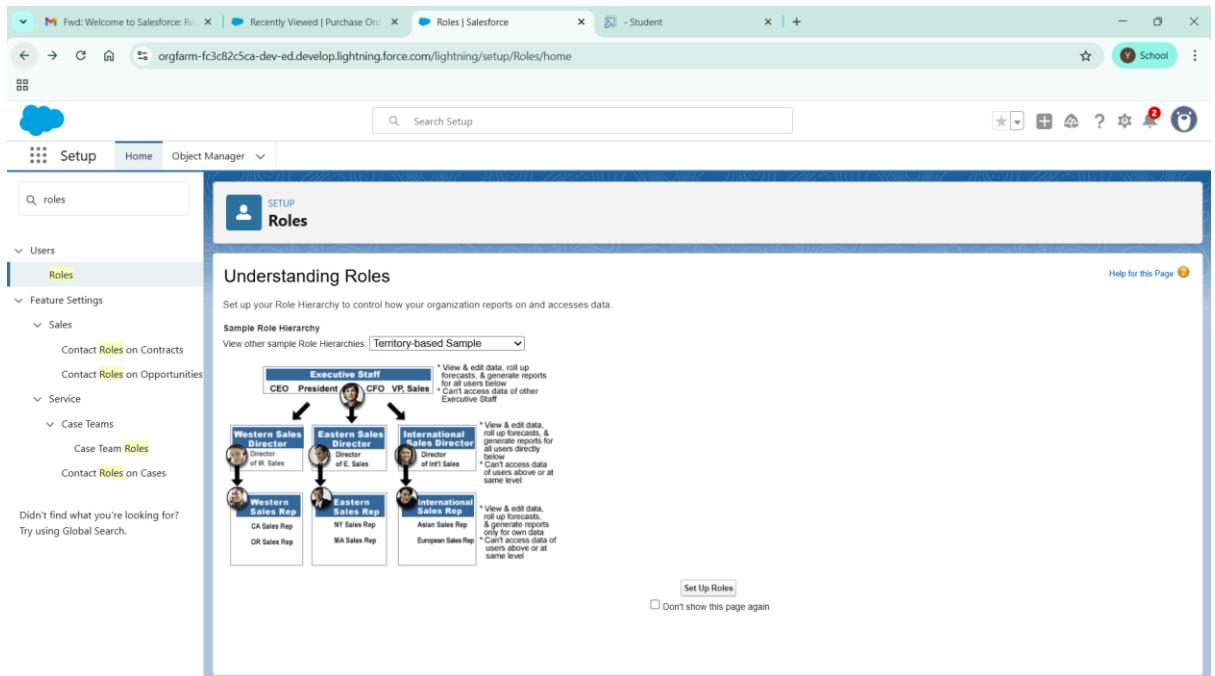
1. Go to quick find >> Search for Roles >> click on Set Up Roles.



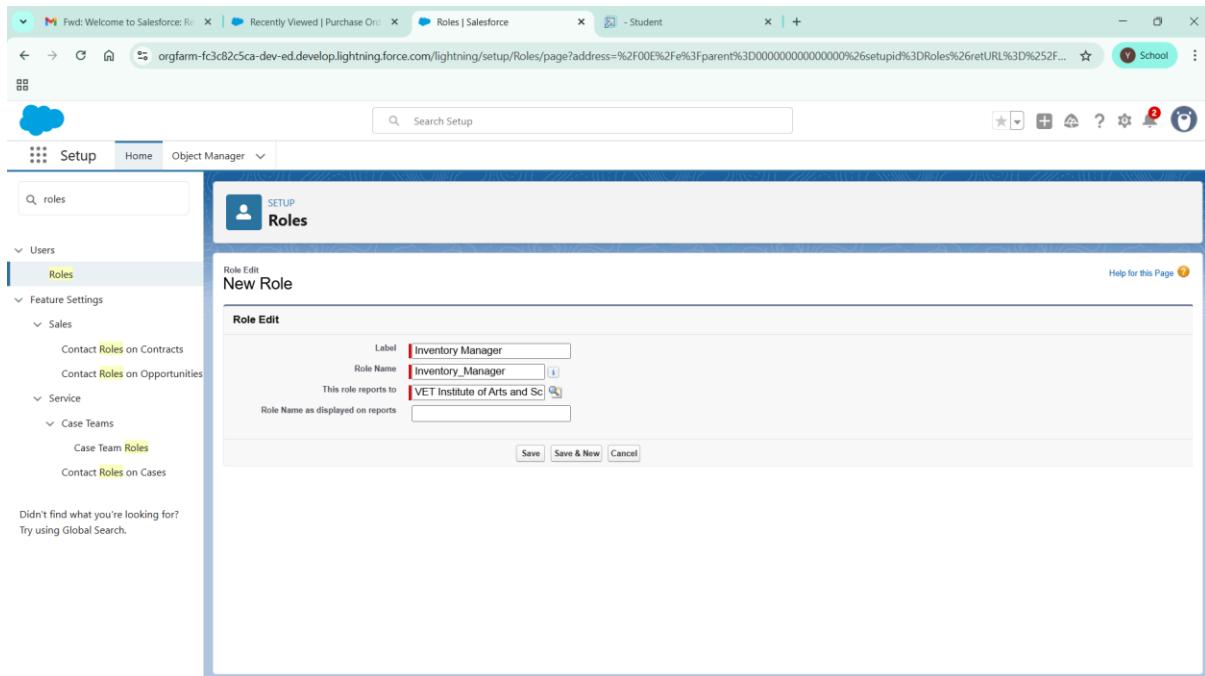
2. Click on Expand All and click on add role under SVP, Sales & Marketing role.
3. Give Label as “Purchasing Manager” and Role name gets auto populated. Then click on Save.

Create a Purchasing Manager Role.

1. Go to quick find >> Search for Roles >> click on Set Up Roles.

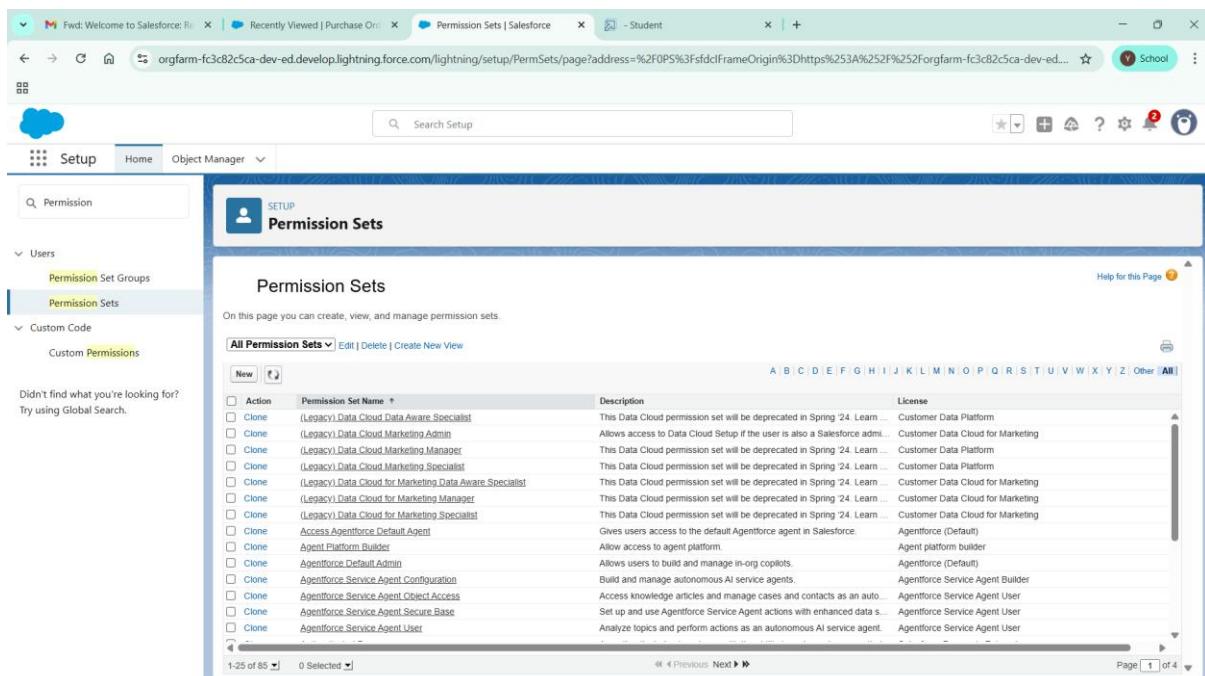


2. Click on Expand All and click on add role under SVP, Sales & Marketing role.
3. Give Label as “Inventory Manager” and the Role name gets auto populated. Then click on Save.

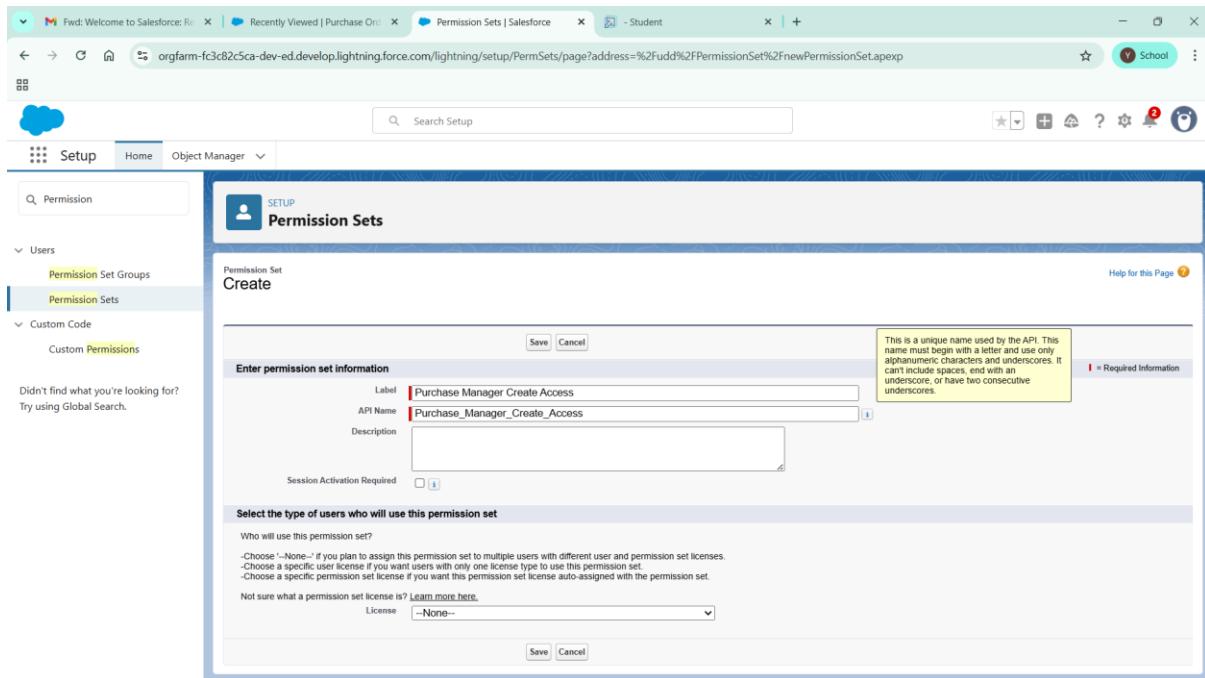


Create a Permission Set.

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



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



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

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

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

Create 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.

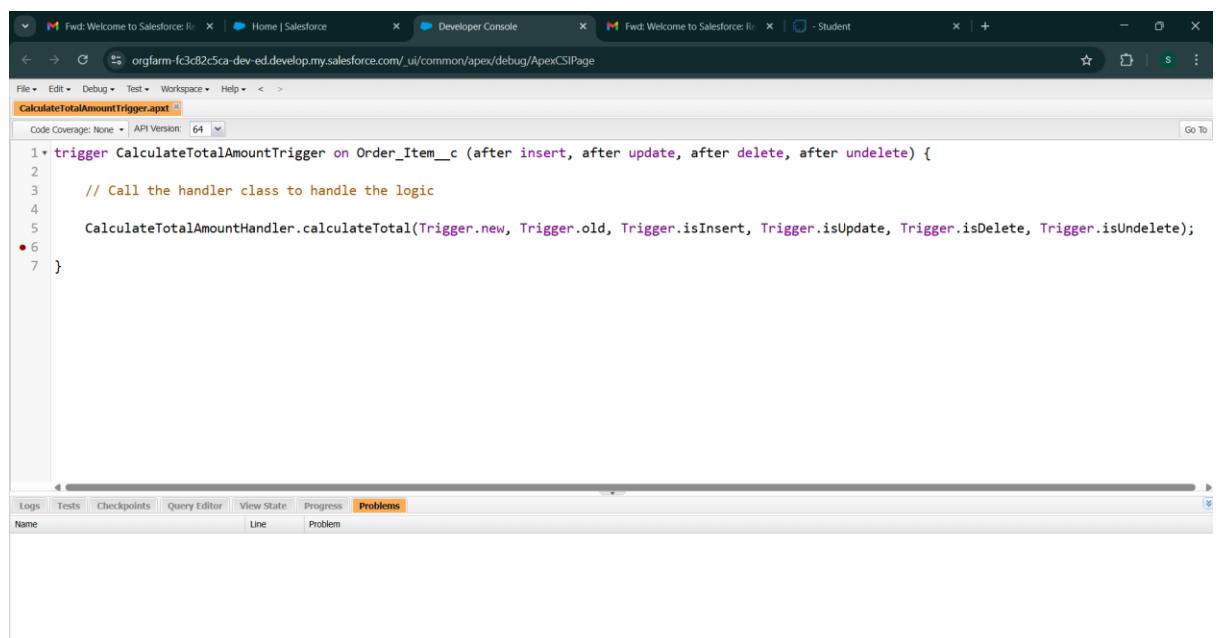
ii) Click on Developer Console: Click on the "Developer Console" option from the Setup menu. This will open the Developer Console in a new browser tab or window.

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.



The screenshot shows the Salesforce Developer Console interface. A tab titled "CalculateTotalAmountTrigger.apxt" is active, displaying the following Apex code:

```
1 * trigger CalculateTotalAmountTrigger on Order_Item__c (after insert, after update, after delete, after undelete) {
2
3     // Call the handler class to handle the logic
4
5     CalculateTotalAmountHandler.calculateTotal(Trigger.new, Trigger.old, Trigger.isInsert, Trigger.isUpdate, Trigger.isDelete, Trigger.isUndelete);
6
7 }
```

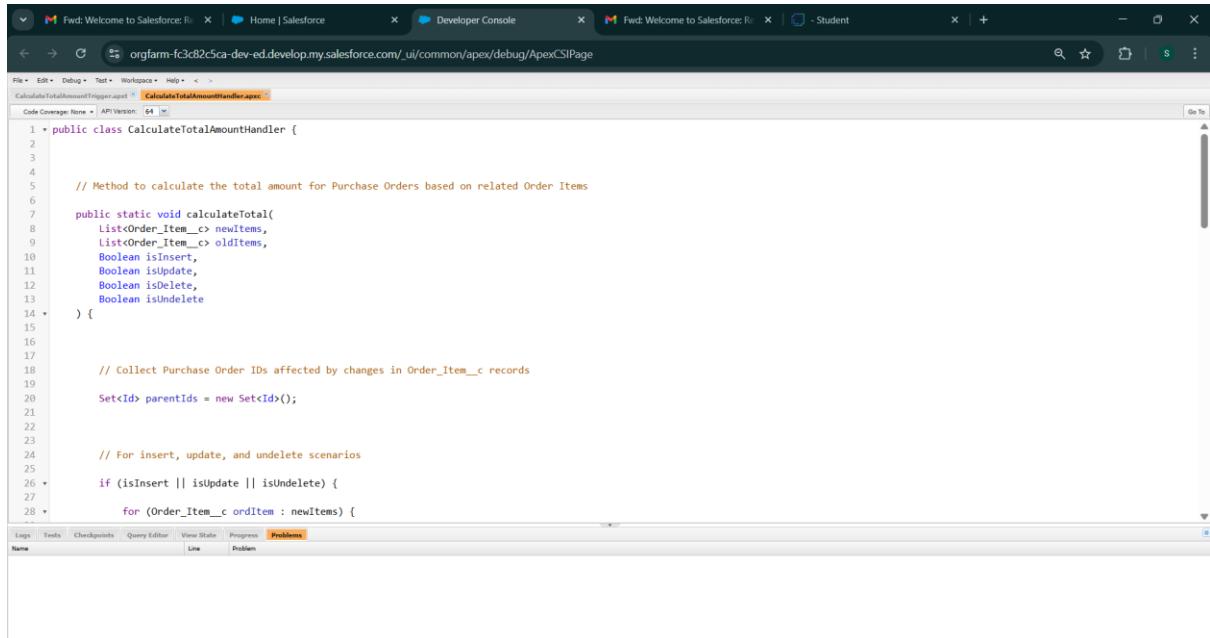
Below the code editor, there is a "Problems" tab in the navigation bar, which is currently selected. The "Logs", "Tests", "Checkpoints", "Query Editor", "View State", and "Progress" tabs are also visible but not selected.

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



The screenshot shows the Salesforce Developer Console interface. The top navigation bar includes tabs for 'Edit', 'Debug', 'Test', 'Workspace', 'Help', and three tabs for 'Fwd: Welcome to Salesforce'. The main area displays the code for 'CalculateTotalAmountHandler.apex'. The code is a public class with a static void method named 'calculateTotal' that takes several parameters and iterates through a list of Order__c records to calculate totals. The code editor has syntax highlighting and line numbers. Below the code editor is a toolbar with tabs for 'Logs', 'Tests', 'Checkpoints', 'Query Editor', 'View State', 'Progress', and 'Problems'. The 'Problems' tab is currently selected.

```
1 * public class CalculateTotalAmountHandler {  
2  
3  
4 // Method to calculate the total amount for Purchase Orders based on related Order Items  
5  
6 public static void calculateTotal(  
7     List<Order__c> newItems,  
8     List<Order__c> oldItems,  
9     Boolean isInsert,  
10    Boolean isUpdate,  
11    Boolean isDelete,  
12    Boolean isUndelete  
13 ) {  
14  
15  
16  
17 // Collect Purchase Order IDs affected by changes in Order__c records  
18 Set<Id> parentIds = new Set<Id>();  
19  
20  
21  
22  
23  
24 // For insert, update, and undelete scenarios  
25  
26 if (isInsert || isUpdate || isUndelete) {  
27     for (Order__c ordItem : newItems) {  
28  
29  
30  
31  
32  
33  
34  
35  
36  
37  
38  
39  
40  
41  
42  
43  
44  
45  
46  
47  
48  
49  
50  
51  
52  
53  
54  
55  
56  
57  
58  
59  
60  
61  
62  
63  
64 }
```

```
public class CalculateTotalAmountHandler {
```

```
// Method to calculate the total amount for Purchase Orders based on related Order Items  
  
public static void calculateTotal(  
    List<Order__c> newItems,  
    List<Order__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__c);
```

```
}
```

```
}
```

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

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

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

```
        parentIds.add(ordItem.Purchase_Order__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__c, SUM(Amount__c)  
        FROM Order_Item__c  
        GROUP BY Purchase_Order__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;  
  
    }  
}  
}  
}
```

Create 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.
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”)

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.

The screenshot shows the Salesforce Reports page. The top navigation bar includes Sales, Home, Opportunities, Leads, Tasks, Files, Accounts, Contacts, Campaigns, Dashboards, Reports, Chatter, Groups, Calendar, and More. The Reports section is selected. On the left, a sidebar lists categories: Recent, Reports (Created by Me, Private Reports, Public Reports, All Reports), Folders (All Folders, Created by Me, Shared with Me), and Favorites (All Favorites). The main content area displays a table of recent reports:

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	Complete Purchase Details Report		Private Reports	Aathi Hari Hara D	9/14/2025, 7:09 AM	
	Purchase Orders based on Suppliers.		Private Reports	Aathi Hari Hara D	9/14/2025, 7:03 AM	

Create 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
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 a Salesforce Lightning interface. The top navigation bar includes tabs for Sales, Home, Opportunities, Leads, Tasks, Files, Accounts, Contacts, Campaigns, Dashboards, Reports, Chatter, Groups, Calendar, and More. The main content area displays a report titled "Purchase Orders based on Suppliers". The report header indicates "Total Records: 0" and "Total Total Order Cost: \$0.00". Below the header is a decorative illustration of a cactus, sun, and clouds. A message "No Results" is centered, followed by the text "No records returned. Try editing report filters." and three bullet points: "Set the Actual Delivery Date filter to All Time", "Edit other filters in the filter panel", and "To Do List". At the bottom of the report are checkboxes for Row Counts, Detail Rows, Subtotals, and Grand Total.

Create 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.

The screenshot shows the Salesforce Lightning interface. At the top, there are several tabs: "Fwd: Welcome to Salesforce: Re", "Recent | Dashboards | Salesforce", "Developer Console", and "Fwd: Welcome to Salesforce: Re". Below the tabs, the URL is "orgfarm-fc3cb2c5ca-dev-ed.develop.lightning.force.com/lightning/o/Dashboard/home?queryScope=mru". The main navigation bar includes "Sales", "Home", "Opportunities", "Leads", "Tasks", "Files", "Accounts", "Contacts", "Campaigns", "Dashboards", "Reports", "Chatter", "Groups", "Calendar", and "More". On the left, the "Dashboards" section of the App Launcher is open, showing a "Recent" list with one item: "Medical Inventory Dashboard" (Created by Me, Private Dashboards, Aathi Hari Hara D, 9/12/2025, 9:21 AM). Other sections include "Folders" and "Favorites".

View Dashboard

1. Click on App Launcher on the left side of the screen.
2. Search Medical Inventory Management & click on it.
3. Click on Dashboard Tab.
4. Click on Medical Inventory DashBoard see graph view of records

The screenshot shows the "Medical Inventory Dashboard" page. The title bar says "Medical Inventory Dashboard". The dashboard header indicates it was last updated "As of Sep 14, 2025, 7:18 AM" by "Aathi Hari Hara D". The main content area has a heading "Purchase Orders based on Suppliers." and a note below it: "We can't draw this chart because there is no data." At the bottom, there are links for "View Report (Purchase Orders based on ...)" and "As of Sep 14, 2025, 7:18 AM". The bottom navigation bar includes "To Do List".