

MEDICAL INVENTORY MANAGEMENT

College Name: Sree Narayana Guru College

College Code: bru36

Team ID: NM2025TMID26523

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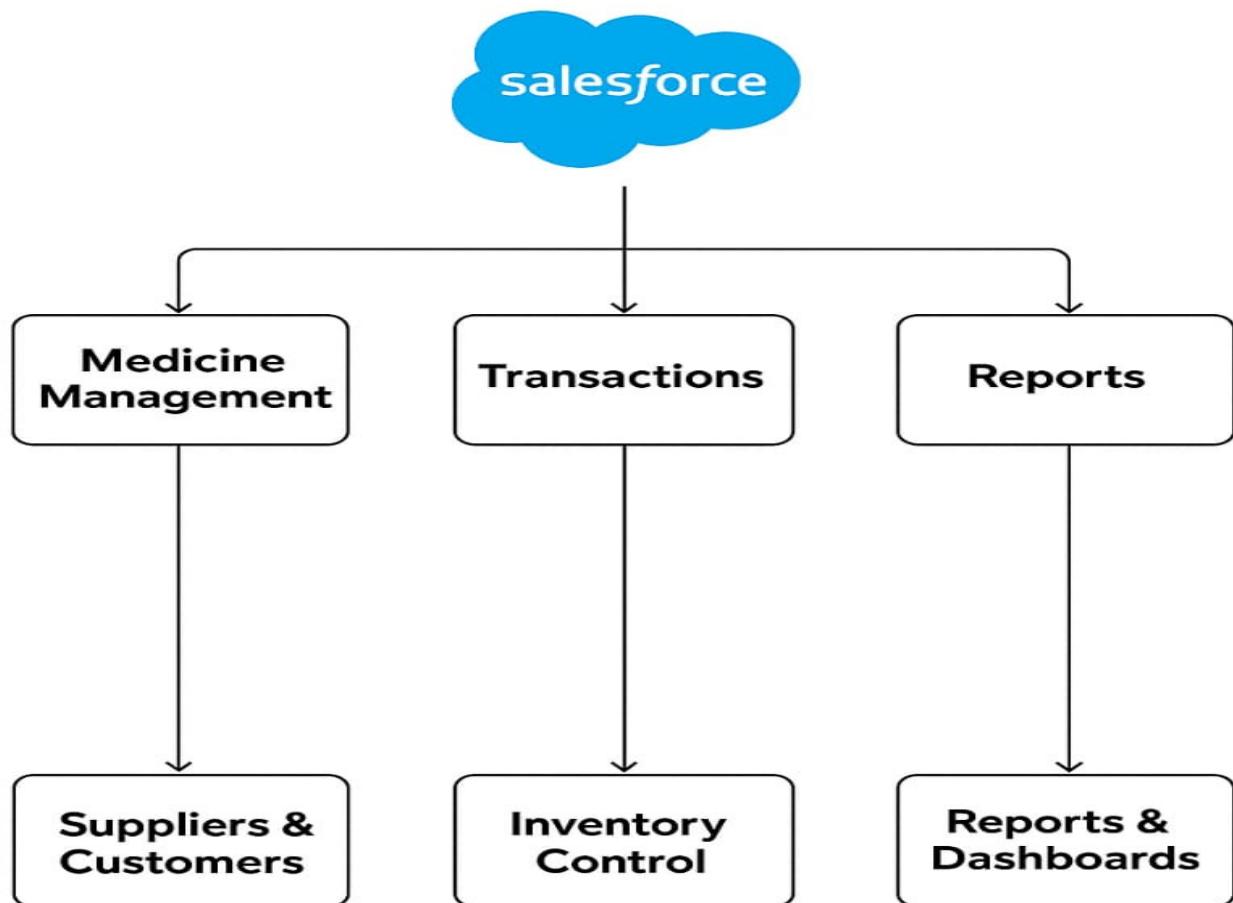
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1. INTRODUCTION

1.1. Project Overview

The Medical Inventory Management System is a Salesforce-based application designed to manage and streamline the flow of medicines, equipment, and supplies in hospitals, pharmacies, and clinics. The project leverages Salesforce CRM features like custom objects, relationships, reports, dashboards, and automation tools to ensure accurate tracking, reduce stockouts, and improve overall efficiency in managing medical

Medical Inventory Management



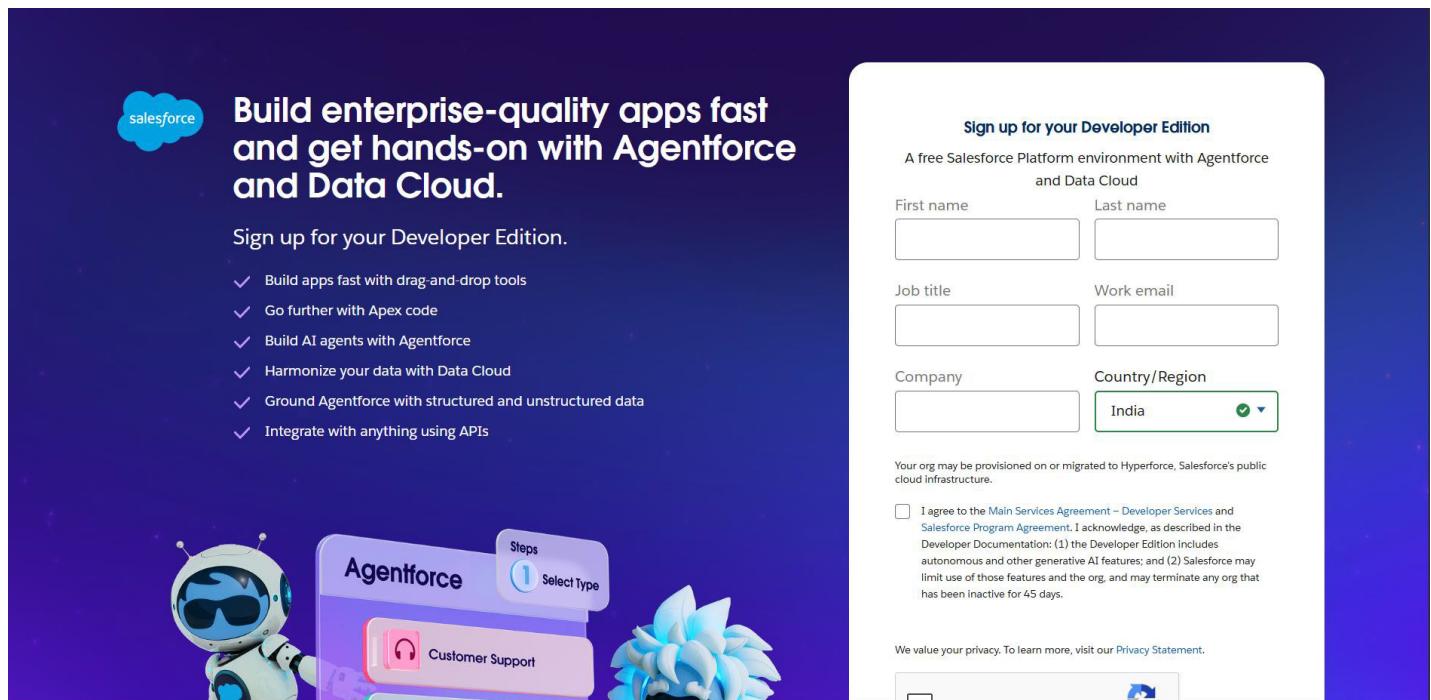
1.2 Purpose

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

API Name	Supplier__c
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-f851a23daa-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01loK0000001vKz/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

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

Finance headline
India's new jobs...

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.

The screenshot shows the 'App Details & Branding' section of the Lightning App Builder. The 'App Name' is set to 'Medical Inventory Management'. The 'Developer Name' is 'Medical_Inventory_Management'. The 'Image' is a circular logo with a blue and green design. The 'Primary Color Hex Value' is '#0070D2'. The 'Description' is 'Medical Inventory Management App'. The 'App Launcher Preview' shows the app icon and name. The status bar at the bottom indicates 'Very humid Now' and the date '10-09-2025'.

The screenshot shows the 'Navigation Items' section of the Lightning App Builder. The 'Available Items' list includes Accounts, Activation Targets, Activations, Active Scratch Orgs, All Sites, Alternative Payment Methods, Analytics, App Launcher, Appointment Categories, Appointment Invitations, Home, Products, Purchase Orders, Order Items, Inventory Transactions, Suppliers, Reports, and Dashboards. The 'Selected Items' list contains Home, Products, Purchase Orders, Order Items, Inventory Transactions, Suppliers, Reports, and Dashboards. The status bar at the bottom indicates 'Trending videos Dogs Adopt a W...' and the date '10-09-2025'.

The screenshot shows the Lightning App Builder interface for 'Medical Inventory Management'. The left sidebar has 'User Profiles' selected. The main area is titled 'User Profiles' and contains a section for 'Available Profiles' and 'Selected Profiles'. The 'Available Profiles' list includes: 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. The 'Selected Profiles' list contains: System Administrator and Inventory Manager. A search bar at the top says 'Type to filter list...'.

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

The screenshot shows the Salesforce Object Manager for the 'Product' object. The left sidebar lists various setup categories like Page Layouts, Lightning Record Pages, etc. The main area is titled 'Fields & Relationships' and shows a table with 9 items. The table columns are: FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The data is as follows:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Current Stock Level	Current_Stock_Level__c	Number(18, 0)		
Last Modified By	LastModifiedById	Lookup(User)		
Minimum Stock Level	Minimum_Stock_Level__c	Number(18, 0)		
Owner	OwnerId	Lookup(User,Group)		✓
Product Description	Product_Description__c	Text Area(255)		
Product ID	Name	Text(80)		✓
Product Name	Product_Name__c	Text(255)		
Unit Price	Unit_Price__c	Currency(16, 2)		

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/01lgK000001vJN/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		

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Search web & PC

ENG IN 10-09-2025

Supplier | Salesforce

orgfarm-f851a23daa-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgK000001vKz/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/01lgK000001vIHI/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' option is selected. The main area displays the page layout editor with tabs for Save, Quick Save, Preview As..., Cancel, Undo, Redo, and Layout Properties. A 'Fields' section contains a table with columns for Field Name, Last Modified By, and Description. The table includes rows for 'Section', 'Blank Space', 'Created By', and 'Current Stock Level'. Below the fields are sections for Information, System Information, Custom Links, and Mobile Cards. A related lists section is also present. The bottom of the screen shows the Windows taskbar with various icons and the date/time (10-09-2025).

The screenshot shows the Salesforce Setup interface for editing the 'Purchase Order' page layout. The left sidebar lists various configuration options like Details, Fields & Relationships, Page Layouts, Lightning Record Pages, etc. The 'Page Layouts' option is selected. The main area displays the page layout editor with tabs for Save, Quick Save, Preview As..., Cancel, Undo, Redo, and Layout Properties. A 'Fields' section contains a table with columns for Field Name, Last Modified By, and Description. The table includes rows for 'Section', 'Blank Space', 'Actual Delivery Date', 'Order Count', 'Supplier ID', and 'Total Order Cost'. Below the fields are sections for Purchase Order Detail, Information, System Information, Custom Links, and Mobile Cards. A related lists section is also present. The bottom of the screen shows the Windows taskbar with various icons and the date/time (10-09-2025).

Inventory Transaction | Salesforce

orgfarm-f851a23daa-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgK000001vJN/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

Section	Owner	Transaction ID
Blank Space	Purchase Order ID	Transaction Type
Created By	Total Order Cost	
Last Modified By	Transaction Date	

Quick Find Field Name * 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 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) Drag expanded lookups and mobile-enabled Visualforce pages here to display them as mobile cards.

Related Lists

28°C Heavy rain Search web & PC ENG IN 10-09-2025 2012

Supplier | Salesforce

orgfarm-f851a23daa-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgK000001vKz/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

Section	Created By	Phone Number
Blank Space	Email	Supplier ID
Address	Last Modified By	Supplier Name
Contact Person	Owner	

Quick Find Field Name * Information (Header visible on edit only) Supplier ID Sample Text Supplier Name Sample Text Contact Person Sample Text System Information (Header visible on edit only) Phone Number 1-415-555-1212 Email sarah.sample@company.com Address Sample Text Owner Sample Text Custom Links (Header visible on edit only)

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

Related Lists

28°C Heavy rain Search web & PC ENG IN 10-09-2025 2013

Order Item | Salesforce

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

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

Fields

Section	Last Modified By	Quantity Ordered
Buttons	Order Item ID	Quantity Received
Quick Actions	Product ID	Unit Price
Mobile & Lightning Actions	Created By	Purchase Order ID
Expanded Lookups		
Related Lists		
Report Charts		

Information (Header visible on edit only)

Order Item ID Sample Text
Amount \$123.45

Purchase Order ID Sample Text

Product Details

Product ID	Sample Text	Quantity Ordered	Quantity Received
Unit Price	\$123.45	91,636	13,902

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)

Drag expanded lookups and mobile-enabled Visualforce pages here to display them as mobile cards.

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Search web & PC

ENG IN 10-09-2025 20:10

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

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

Product Compact Layout

Back to Product

Help for this Page

Compact Layout Detail

Label	Product Compact Layout	Object Name	Product
API Name	Product_Compact_Layout		
Included Fields	Product Name Unit Price Current Stock Level		
Created By	Nair Arjun Murlidharan, 9/3/2025, 1:10 AM	Modified By	Nair Arjun Murlidharan, 9/3/2025, 1:10 AM

Edit Clone Delete Compact Layout Assignment

Edit Clone Delete 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. The layout 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. The rule is named 'Expected_Delivery_Date_Validation' and has the formula '(Expected_Delivery_Date__c - Order_Date__c) > 7'. The error message states 'The Expected Delivery Date should not exceed 7 days.' The rule is active and located at the top of the page. It was created by Nair Arjun Muridharan on 9/3/2025, 2:18 AM.

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

The screenshot shows the Salesforce Setup interface with the 'Profiles' page selected. The 'Inventory Manager' profile is displayed. The profile details include:

- Name:** Inventory Manager
- User License:** Salesforce
- Description:** (empty)
- Created By:** Nair Arjun Muridharan, 9/3/2025, 7:12 AM
- Modified By:** Nair Arjun Muridharan, 9/3/2025, 7:19 AM

Page Layouts

Object	Layout Type	Assignment	Assignment Type	
Global	Global Layout	[View Assignment]	Location Group Assignment	Location Group Assignment Layout
Email Application	Not Assigned	[View Assignment]	Macro	Macro Layout [View Assignment]
Home Page Layout	Home Page Default	[View Assignment]	Namespace Registry	Namespace Registry Layout [View Assignment]
Account	Account Layout	[View Assignment]	Object Milestone	Object Milestone Layout [View Assignment]
Active Scratch Org	Active Scratch Org Layout	[View Assignment]	Operating Hours	Operating Hours Layout [View Assignment]
Alternative Payment Method	Alternative Payment Method Layout	[View Assignment]	Opportunity	Opportunity Layout [View Assignment]

The screenshot shows the Salesforce Setup interface with the 'Profiles' page selected. The 'Purchase Manager' profile is displayed. The profile details include:

- Name:** Purchase Manager
- User License:** Salesforce
- Description:** (empty)
- Created By:** Nair Arjun Muridharan, 9/3/2025, 7:20 AM
- Modified By:** Nair Arjun Muridharan, 9/3/2025, 7:23 AM

Page Layouts

Object	Layout Type	Assignment	Assignment Type	
Global	Global Layout	[View Assignment]	Location Group Assignment	Location Group Assignment Layout [View Assignment]
Email Application	Not Assigned	[View Assignment]	Macro	Macro Layout [View Assignment]
Home Page Layout	Home Page Default	[View Assignment]	Namespace Registry	Namespace Registry Layout [View Assignment]
Account	Account Layout	[View Assignment]	Object Milestone	Object Milestone Layout [View Assignment]
Active Scratch Org	Active Scratch Org Layout	[View Assignment]	Operating Hours	Operating Hours Layout [View Assignment]
Alternative Payment Method	Alternative Payment Method Layout	[View Assignment]	Opportunity	Opportunity Layout [View Assignment]

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 ()

Role Detail		Edit	Delete
Label	Inventory Manager	Role Name	Inventory_Manager
This role reports to	SVP_Sales & Marketing	Role Name as displayed on reports	
Modified By	Nair Arjun Muralidharan, 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

Users in Inventory Manager Role Help ?

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 ()

Role Detail		Edit	Delete
Label	Purchasing Manager	Role Name	Purchasing_Manager
This role reports to	SVP_Sales & Marketing	Role Name as displayed on reports	
Modified By	Nair Arjun Muralidharan, 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

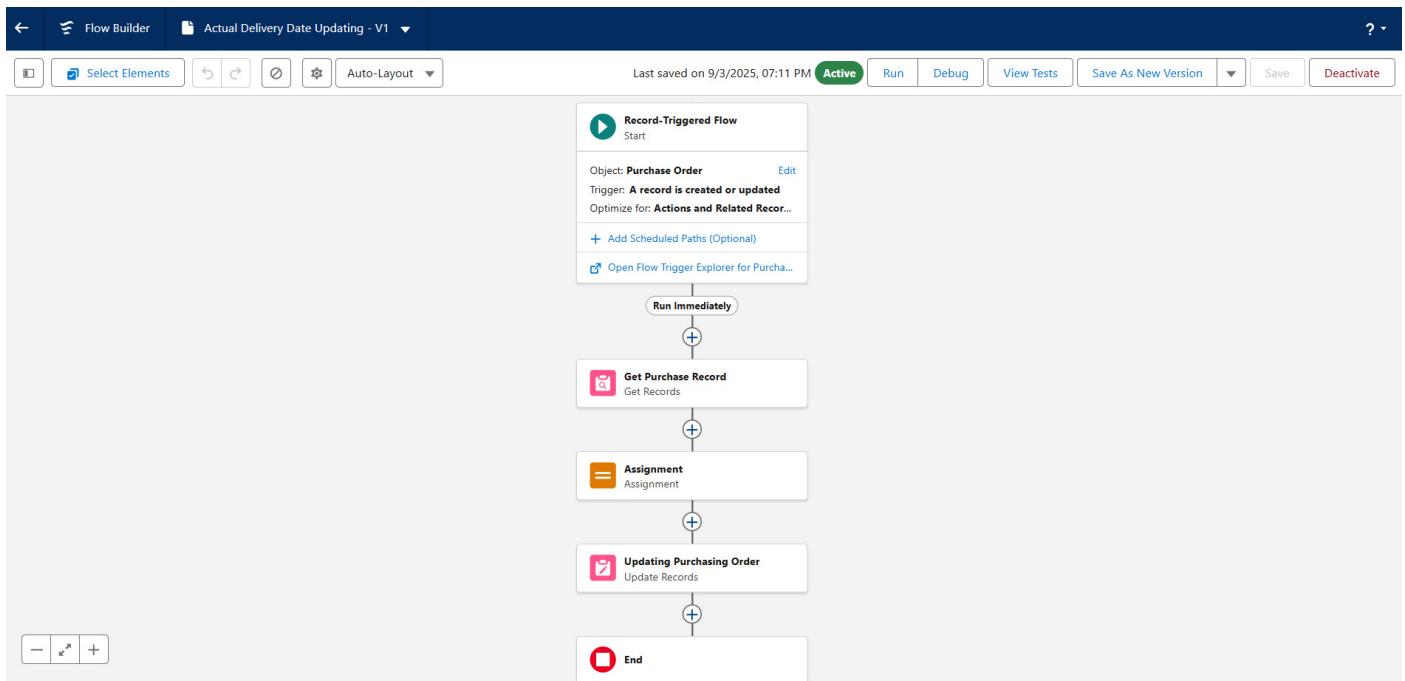
Users in Purchasing Manager Role Help ?

No records to display

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

The screenshot shows the Salesforce Setup interface. In the left sidebar, under 'Users', 'Permission Sets' is selected. The main area displays a 'Permission Set Overview' for a newly created permission set named 'Purchase Manager Create Access'. The overview includes fields for API Name (Purchase_Manager), Namespace Prefix, Created By (Nair Arjun Murlidharan), and Last Modified By (Nair Arjun Murlidharan). Below the overview, the 'Apps' section lists various settings: Assigned Apps, Assigned Connected Apps, Object Settings, App Permissions, Apex Class Access, Visualforce Page Access, 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: CalculateTotalAmountTrigger

sObject Type: Order Item

Code Coverage: 0% (0/1)

Created By: Nair Arjun Murlidharan, 9/11/2025, 6:01 AM

Last Modified By: Nair Arjun Murlidharan, 9/11/2025, 6:01 AM

Help for this Page

Apex Trigger Version Settings Trace Flags

```

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

```

Apex Classes:- We created Apex Handler class.

Search Setup

Custom Code

Apex Classes

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

Apex Class Detail

Name: CalculateTotalAmountHandler
Namespace Prefix:
Created By: Nair Arjun Murlidharan, 9/3/2025, 6:55 AM

Status: Active
Code Coverage: 0% (0/22)
Last Modified By: Nair Arjun Murlidharan, 9/11/2025, 6:01 AM

Class Body

```

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        // For insert, update, and undelete scenarios
14        if (isInsert || isUpdate || isUndelete) {
15            for (Order_Item__c newItem : newItems) {
16
17                // Add the parent ID to the set
18                parentIds.add(newItem.ParentOrder__c);
19
20            }
21
22        }
23
24    }

```

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

Medical Inventory ...

Search...

Home Products Purchase Orders Order Items Inventory Transactions Suppliers Reports Dashboards

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

Total Records	Total Order Count	Total Quantity Received	Total Amount
1	1	50	₹1,000.00
<input type="checkbox"/> Supplier ID ↑ <input type="checkbox"/> Actual Delivery Date ↑ <input type="checkbox"/> Purchase Order: ID ↑ <input type="checkbox"/> Purchase Order: Purchase Order ID <input type="checkbox"/> Order Item: Order Item ID <input type="checkbox"/> Product ID: Product Name <input type="checkbox"/> Product ID: Product ID <input type="checkbox"/> Order Count <input type="checkbox"/> Quantity Received <input type="checkbox"/> Amount			
<input type="checkbox"/> SP002 (1) 9/14/2025 (1) a01gK00000JmmLx (1) P0002 OI002 paracetamol 01lgK00005gxNP 1 50 ₹1,000.00			
Subtotal			
Subtotal			
Total (1)			

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

Sum of Order Count

Supplier ID: SP001 (Blue), SP002 (Dark Blue)

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

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)

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 main title bar includes the logo and the text "Medical Inventory ...". The top navigation bar has links for Home, Products, Purchase Orders, Order Items (which is the active tab), Inventory Transactions, Suppliers, Reports, and Dashboards. A search bar is located at the top center. On the left, there's a sidebar with a "Related" section and a "Details" section. The "Details" section contains fields for Order Item ID (OID003), Purchase Order ID (PO002), Amount (₹2,500.00), and Product Details (Product ID: anesthasia, Unit Price: ₹50.00). It also shows Quantity Ordered (100), Quantity Received (50), and Last Modified By (Nair Arjun Murlidharan). To the right, there's an "Activity" section with a sub-section for "Upcoming & Overdue" which is currently empty.

Validation Rule checking

The screenshot shows a CRM application interface for a medical inventory system. The main title bar includes the logo and the text "Medical Inventory ...". The top navigation bar has links for Home, Products, Purchase Orders (which is the active tab), Order Items, Inventory Transactions, Suppliers, Reports, and Dashboards. A search bar is located at the top center. On the left, there's a sidebar with a "Recently Viewed" section showing two items: PO002 and PO001. The main area is a modal window titled "New Purchase Order". It has sections for "Information" and "Review the errors on this page.". The "Information" section includes fields for Purchase Order ID (P002), Supplier ID (SP002), Order Date (9/14/2025), and Expected Delivery Date (9/27/2025). A validation error message is displayed: "Ø We hit a snag. Review the errors on this page. • The Expected Delivery Date should not exceed 7 days." At the bottom of the modal are buttons for Cancel, Save & New, and Save.

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

Products Page

Products

Recently Viewed

Product ID

P001

P004

P003

P002

New Import Change Owner Assign Label

Search this list... Filter Sort

Purchase Orders

The screenshot shows the 'Purchase Orders' page within a CRM interface. The top navigation bar includes links for Home, Products, Purchase Orders, Order Items, Inventory Transactions, Suppliers, Reports, and Dashboards. A search bar at the top right contains the placeholder 'Search...'. Below the navigation is a toolbar with icons for New, Import, Change Owner, and Assign Label. A 'Recently Viewed' section displays two items: 'PO002' and 'PO001'. A table lists these purchase orders with columns for 'Purchase Order ID' and other details. The URL in the browser's address bar is https://orgfarm-f851a23diaa-dev-ed.develop.lightning.force.com/lightning/o/Purchase_Order__c/home.

Order items

The screenshot shows the 'Order Items' page within a CRM interface. The top navigation bar includes links for Home, Products, Purchase Orders, Order Items, Inventory Transactions, Suppliers, Reports, and Dashboards. A search bar at the top right contains the placeholder 'Search...'. Below the navigation is a toolbar with icons for New, Import, and Assign Label. A 'Recently Viewed' section displays three items: 'OID003', 'OID002', and 'OID001'. A table lists these order items with columns for 'Order Item ID' and other details. The URL in the browser's address bar is https://orgfarm-f851a23diaa-dev-ed.develop.lightning.force.com/lightning/o/Order_Item__c/home.

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. A search bar labeled 'Search...' is located at the top right. Below the navigation bar, a header bar includes 'Inventory Transactions', 'Recently Viewed', and buttons for New, Import, Change Owner, and Assign Label. A 'Search this list...' field and various filter and sort icons are also present. The main content area displays a table with one item: '1 item • Updated a few seconds ago'. The table has columns for Transaction ID (checkbox) and Transaction ID (value TN001). The entire interface has a light blue and white color scheme.

Suppliers

The screenshot shows the 'Suppliers' screen. The navigation bar at the top includes links for Home, Products, Purchase Orders, Order Items, Inventory Transactions, Suppliers (which is the active tab), Reports, and Dashboards. A search bar labeled 'Search...' is at the top right. Below the navigation bar, a header bar includes 'Suppliers', 'Recently Viewed', and buttons for New, Import, Change Owner, and Assign Label. A 'Search this list...' field and filter/sort icons are also present. The main content area displays a table with two items: '2 items • Updated a few seconds ago'. The table has columns for Supplier ID (checkbox) and Supplier ID (values SP001 and SP002). The entire interface has a light blue and white color scheme.

Reports

The screenshot shows the 'Reports' section of a web application. At the top, there's a search bar with placeholder text 'Search...'. Below it is a navigation bar with links: Home, Products, Purchase Orders, Order Items, Inventory Transactions, Suppliers, Reports (which is currently selected), and Dashboards. On the far right of the navigation bar are icons for star, plus, cloud, question mark, gear, bell, and user profile.

The main area has a sidebar on the left with categories: Reports, Recent (2 items), Reports (Recent), Created by Me, Private Reports, Public Reports, All Reports, Folders, All Folders, Created by Me, Shared with Me, Favorites, and All Favorites. The 'Recent' section contains two items:

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"/>	

Dashboards

The screenshot shows the 'Dashboards' section of the application. The layout is similar to the 'Reports' page, with a search bar at the top and a navigation bar below it. The 'Reports' link in the navigation bar is now highlighted.

The sidebar on the left includes: Dashboards, Recent (1 item), Dashboards (Recent), Created by Me, Private Dashboards, All Dashboards, Folders, All Folders, Created by Me, Shared with Me, Favorites, and All Favorites. The 'Recent' section shows one item:

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"/>	

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:-

1Initial Setup Complexity – Customizing Salesforce objects, fields, and automation requires technical knowledge

2Dependency on Internet – As Salesforce is cloud-based, it needs a reliable internet connection.

3Cost Factor – Salesforce licensing and storage may be expensive for small clinics or pharmacies.

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

5 Customization 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.