

Medical Inventory Management

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College Code: Bru06

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INTRODUCTION:

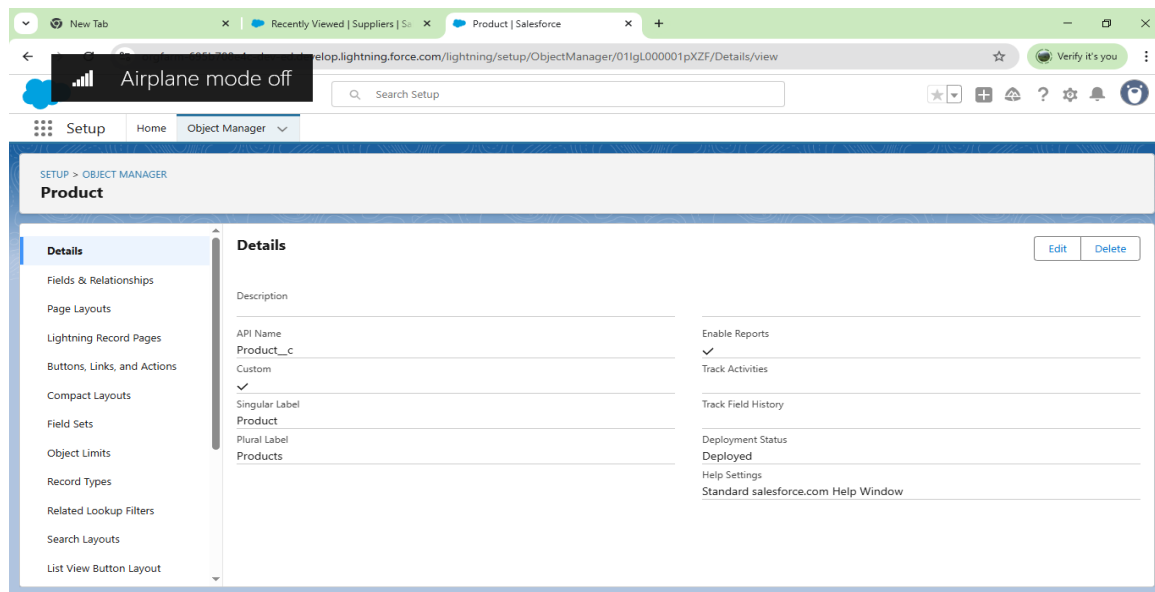
The Medical Inventory Management System is a comprehensive Salesforce application designed to streamline and manage various operational aspects of the medical inventory. It can efficiently maintain supplier details, manage purchase orders, track product details and transactions, and monitor expiry dates of products, thereby improving

Operational

DEVELOPMENT PHASE

Creating Developer Account:

Byusing this URL-<https://developer.salesforce.com/signup>



Browser tabs: New Tab, Recently Viewed | Suppliers | S..., Order Item | Salesforce

Address bar: orgfarm-695b708e4c-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgL000001pa45/Details/view

Search Setup

Setup Home 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

Details [Edit](#) [Delete](#)

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

Browser tabs: New Tab, Recently Viewed | Suppliers | S..., Inventory Transaction | Salesforce

Address bar: orgfarm-695b708e4c-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgL000001pa71/Details/view

Search Setup

Setup Home Object Manager

Inventory Transaction

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- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters
- Search Layouts
- List View Button Layout

Details [Edit](#) [Delete](#)

Description

API Name
Inventory_Transaction__c

Custom
✓

Singular Label
Inventory Transaction

Plural Label
Inventory Transactions

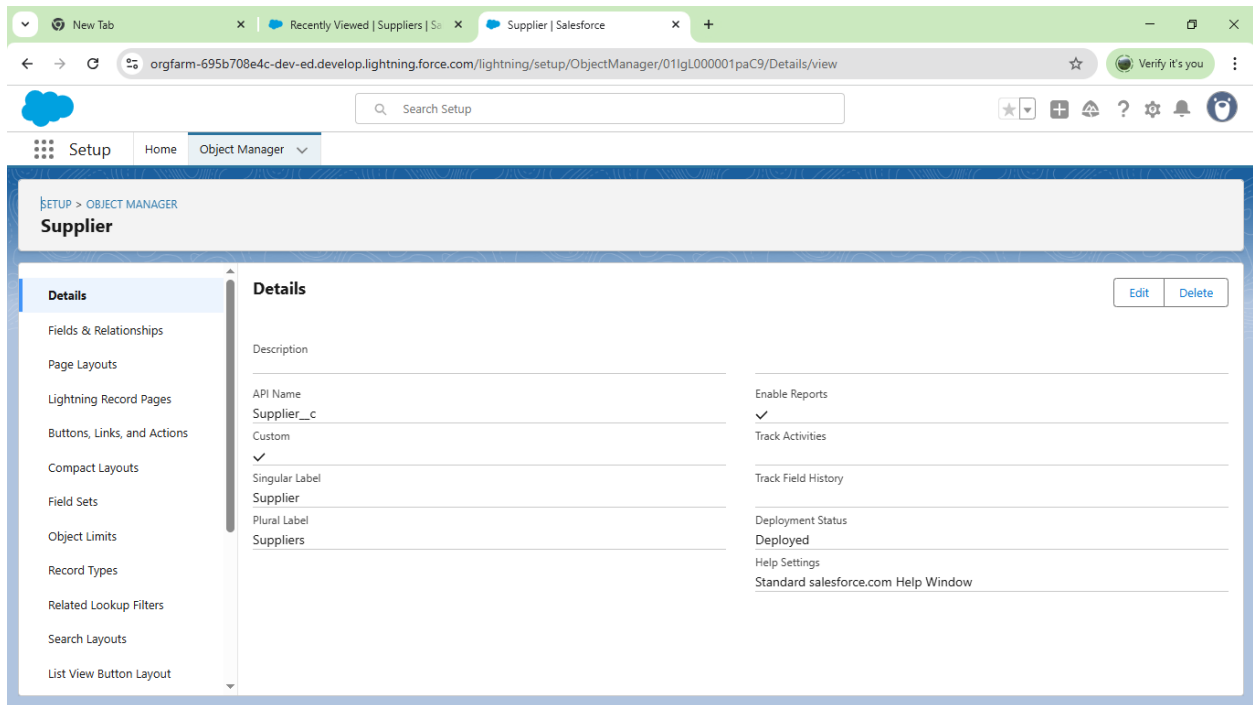
Enable Reports
✓

Track Activities

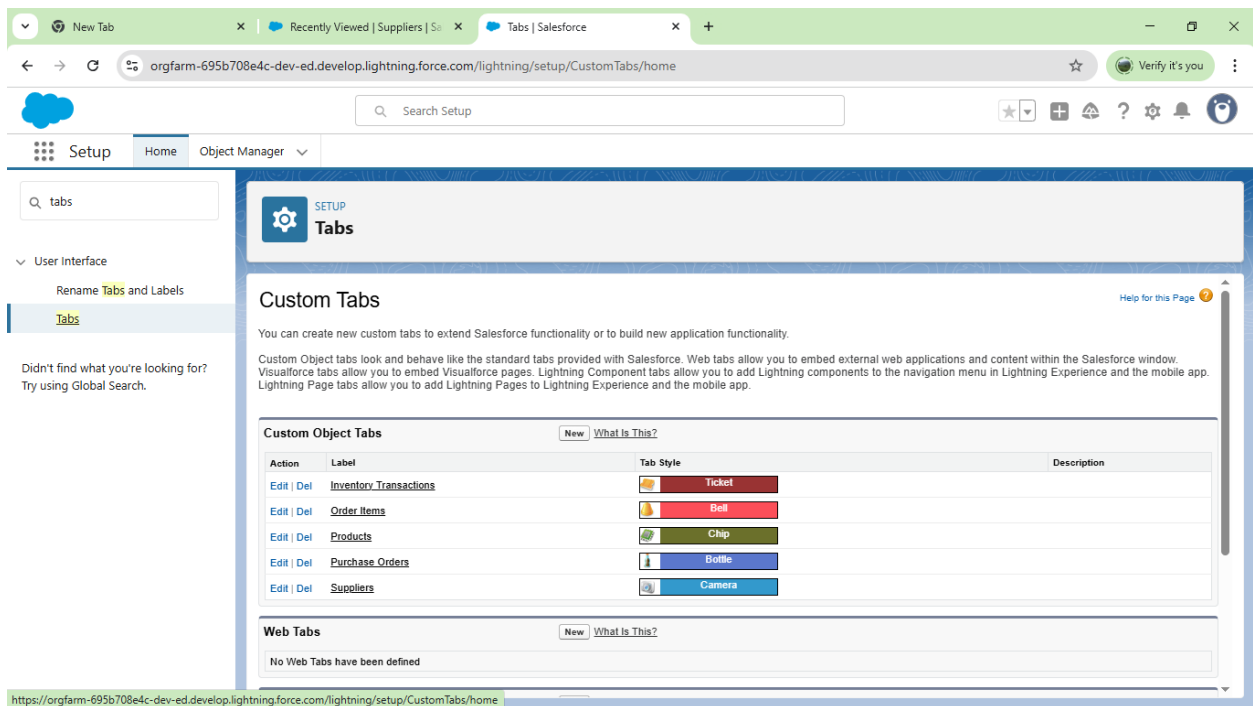
Track Field History

Deployment Status
Deployed

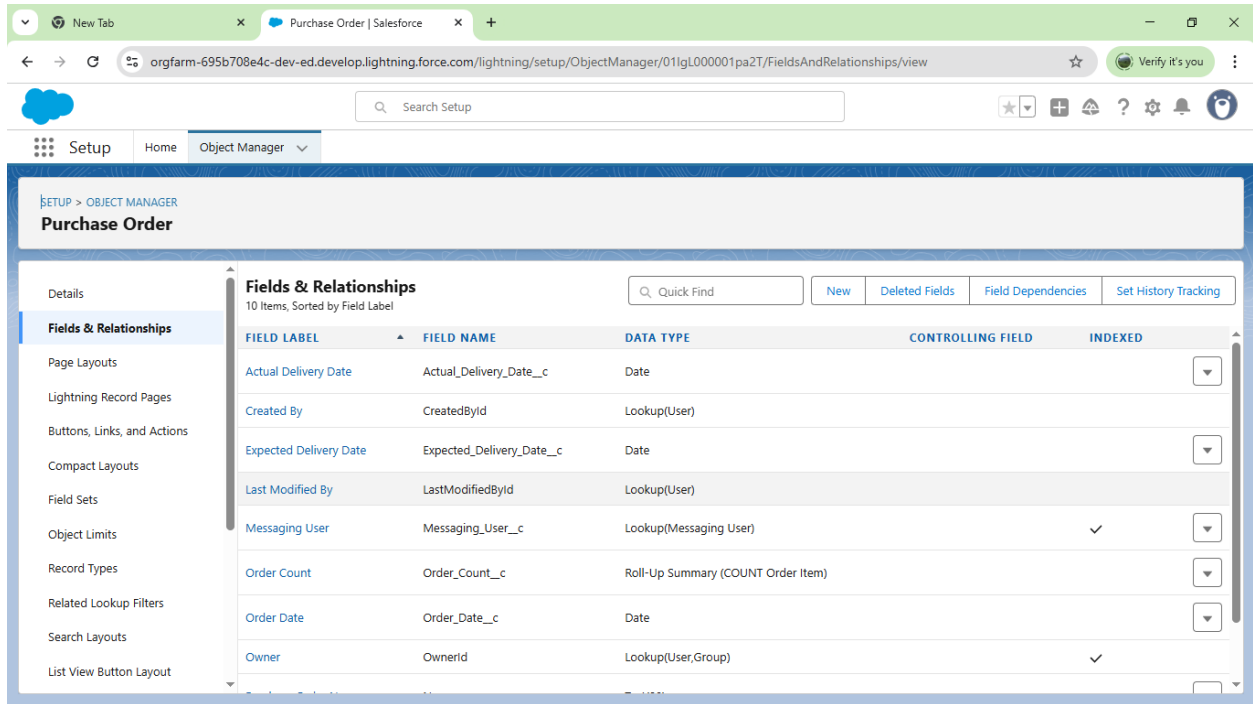
Help Settings
Standard salesforce.com Help Window



Create a Tab For Object

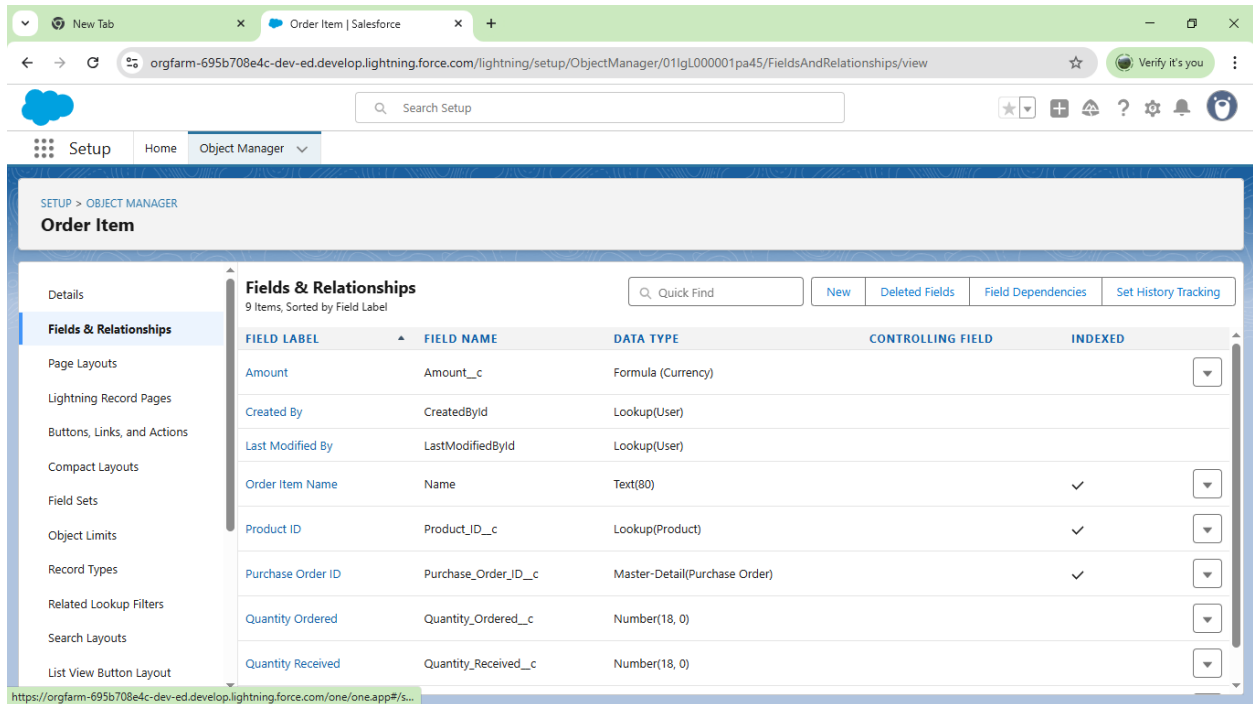


Configure fields and relationship



The screenshot shows the Salesforce Setup page for the 'Purchase Order' object. The left sidebar contains a navigation menu with options: 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, and List View Button Layout. The main content area is titled 'Fields & Relationships' and shows a table of 10 fields. The table has columns for FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The fields listed are: Actual Delivery Date, Created By, Expected Delivery Date, Last Modified By, Messaging User, Order Count, Order Date, and Owner. The 'Owner' field is highlighted in blue.

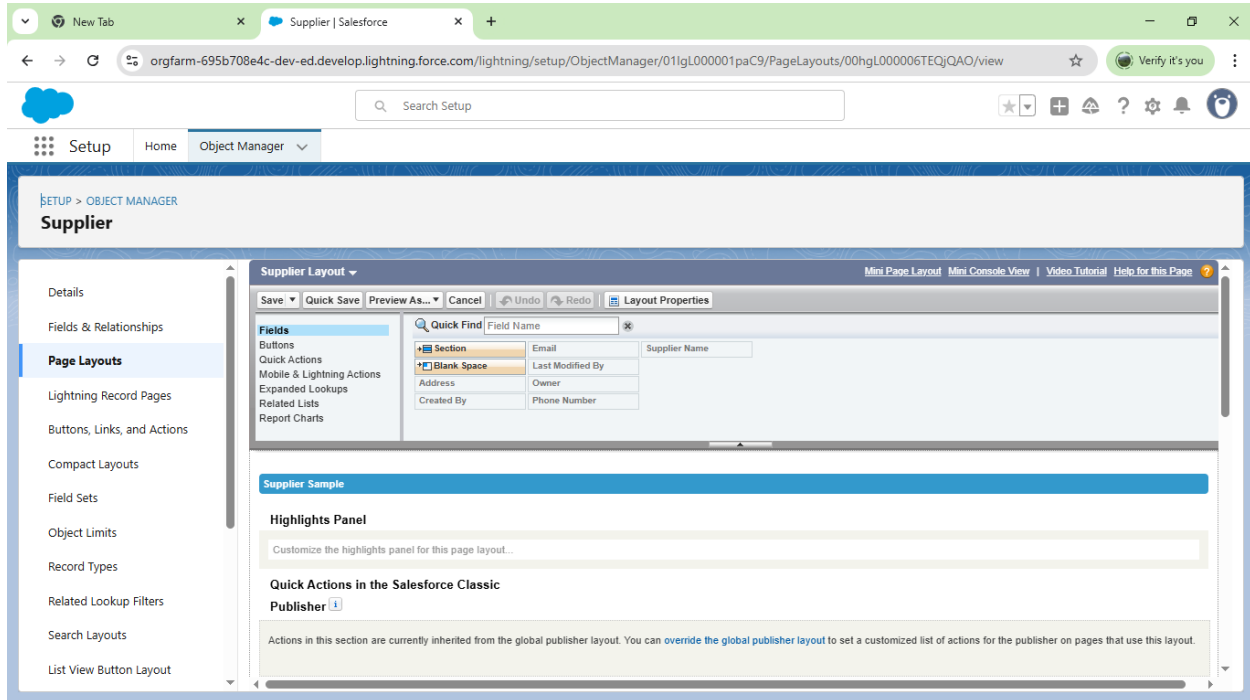
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Actual Delivery Date	Actual_Delivery_Date__c	Date		
Created By	CreatedById	Lookup(User)		
Expected Delivery Date	Expected_Delivery_Date__c	Date		
Last Modified By	LastModifiedById	Lookup(User)		
Messaging User	Messaging_User__c	Lookup(Messaging User)		✓
Order Count	Order_Count__c	Roll-Up Summary (COUNT Order Item)		
Order Date	Order_Date__c	Date		
Owner	OwnerId	Lookup(User,Group)		✓



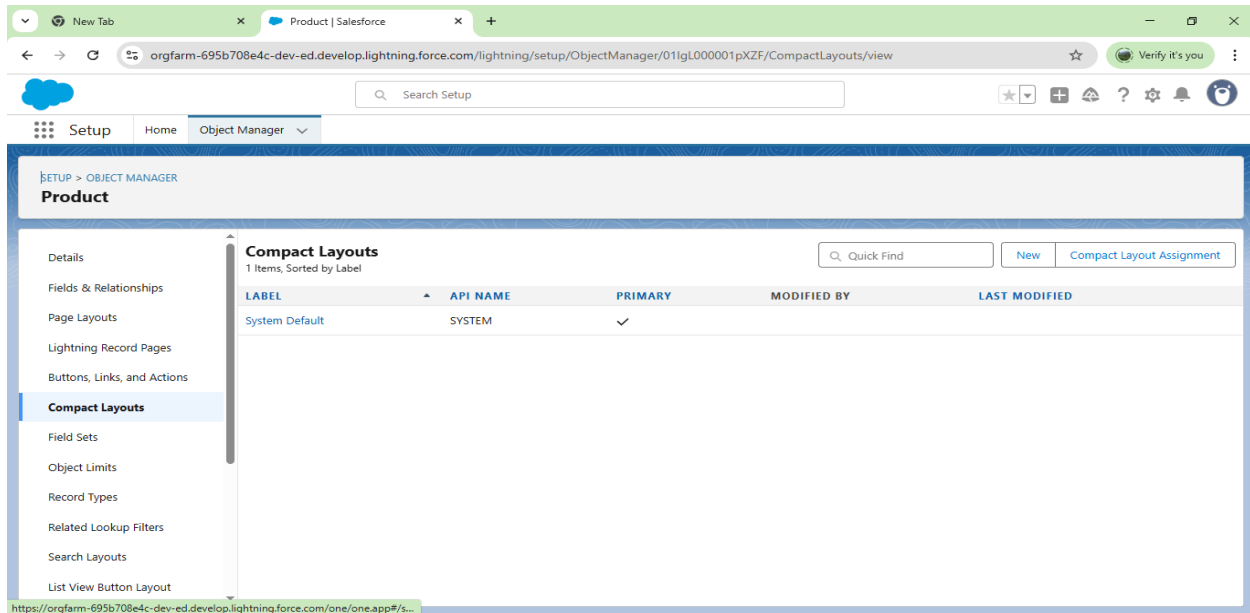
The screenshot shows the Salesforce Setup page for the 'Order Item' object. The left sidebar contains a navigation menu with options: Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, and List View Button Layout. The main content area is titled 'Fields & Relationships' and shows a table of 9 fields. The table has columns for FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The fields listed are: Amount, Created By, Last Modified By, Order Item Name, Product ID, Purchase Order ID, Quantity Ordered, and Quantity Received. The 'Order Item Name' field is highlighted in blue.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Amount	Amount__c	Formula (Currency)		
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Order Item Name	Name	Text(80)		✓
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(18, 0)		

Developed Of Page Layouts



The screenshot shows the Salesforce Setup interface for configuring the 'Supplier' page layout. The left sidebar contains a navigation menu with options: Details, Fields & Relationships, Page Layouts (selected), Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, and List View Button Layout. The main content area is titled 'Supplier' and shows the 'Supplier Layout' configuration. The 'Fields' section is active, displaying a list of fields: Email, Last Modified By, Supplier Name, Address, Owner, Created By, and Phone Number. The 'Quick Find' field is set to 'Supplier Name'. Below the fields, there are sections for 'Supplier Sample', 'Highlights Panel' (with a placeholder 'Customize the highlights panel for this page layout...'), and 'Quick Actions in the Salesforce Classic' (with a placeholder 'Actions in this section are currently inherited from the global publisher layout. You can override the global publisher layout to set a customized list of actions for the publisher on pages that use this layout.').



The screenshot shows the Salesforce Setup interface for configuring the 'Product' compact layouts. The left sidebar contains a navigation menu with options: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts (selected), Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, and List View Button Layout. The main content area is titled 'Product' and shows the 'Compact Layouts' configuration. The 'Compact Layouts' section is active, displaying a table with 1 item, sorted by Label. The table has columns: LABEL, API NAME, PRIMARY, MODIFIED BY, and LAST MODIFIED. The table contains one row: 'System Default', 'SYSTEM', and a checkmark in the 'PRIMARY' column. The 'Quick Find' field is set to 'System Default'. The 'New' button is labeled 'Compact Layout Assignment'.

LABEL	API NAME	PRIMARY	MODIFIED BY	LAST MODIFIED
System Default	SYSTEM	✓		

To Create Profiles

The screenshot shows the Salesforce Setup interface for the 'Profiles' section. The left sidebar contains a search bar with 'profiles' entered and a navigation menu with 'Users' and 'Profiles' (selected). The main content area is titled 'Standard User' and includes a description of profiles and their permissions. Below this, there is a 'Profile Detail' section with buttons for 'Edit', 'Clone', and 'View Users'. The 'Page Layouts' section displays a table of layouts for various objects.

Profile: Standard User

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

Login IP Ranges (0) | Enabled Apex Class Access (0) | Enabled Visualforce Page Access (0) | Enabled External Data Source Access (0) | Enabled Named Credential Access (0) | Enabled External Credential Principal Access (0) | Enabled Custom Metadata Type Access (0) | Enabled Custom Setting Definitions Access (0) | Enabled Flow Access (0) | Enabled Service Presence Status Access (0) | Enabled Custom Permissions (0)

Profile Detail

Name: Standard User **Edit** **Clone** **View Users**

User License: Salesforce **Custom Profile:** ☐

Created By: salesforce.com, inc., 6/21/2025, 11:37 AM **Modified By:** Anunkumar J. 9/22/2025, 4:16 AM

Page Layouts

Standard Object Layouts	Global	Location Group Assignment
Global	Global Layout (View Assignment)	Location Group Assignment Layout (View Assignment)
Email Application	Not Assigned (View Assignment)	Macro Layout (View Assignment)
Home Page Layout	Home Page Default (View Assignment)	Object Milestone Layout (View Assignment)
Account	Account Layout (View Assignment)	Operating Hours Layout (View Assignment)

Create a Permission Set

The screenshot shows the Salesforce Setup interface for the 'Permission Sets' section. The left sidebar contains a search bar with 'permission sets' entered and a navigation menu with 'Users' and 'Permission Sets' (selected). The main content area is titled 'Permission Sets' and includes a description of permission sets. Below this, there is a table listing existing permission sets with columns for 'Action', 'Permission Set Name', 'Description', and 'License'.

Permission Sets

On this page you can create, view, and manage permission sets.

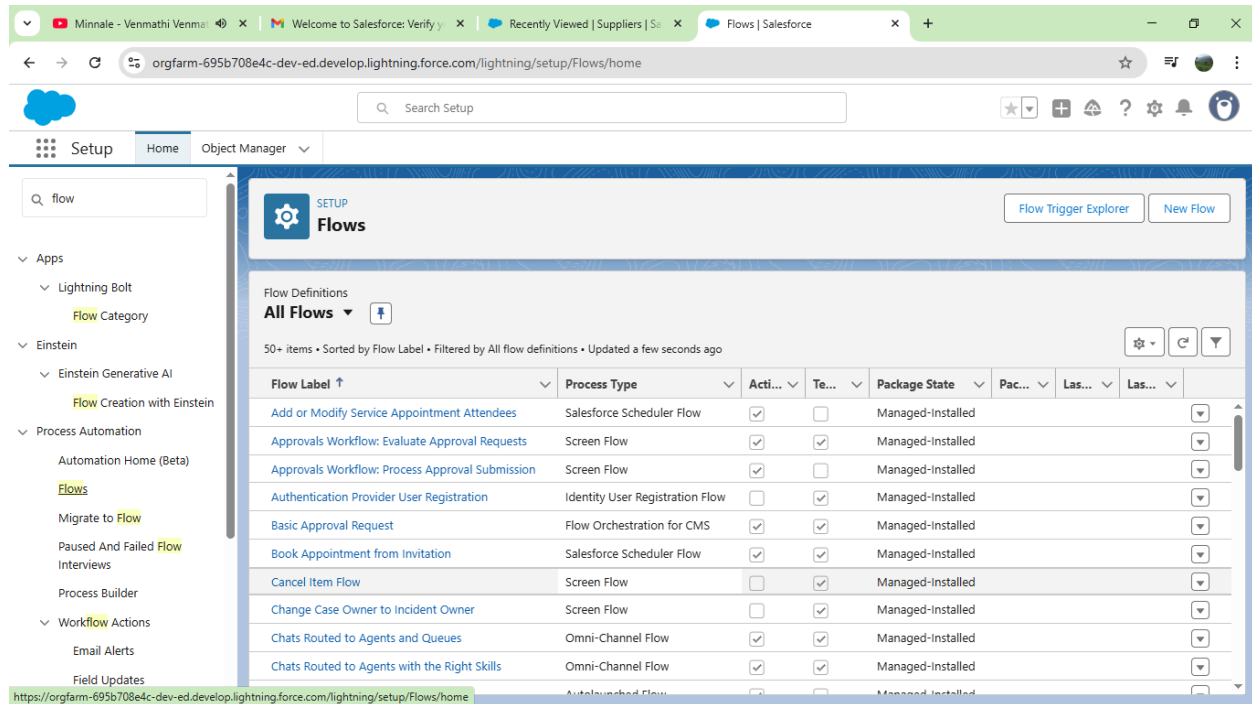
All Permission Sets **Edit** **Delete** **Create New View**

New **⌵**

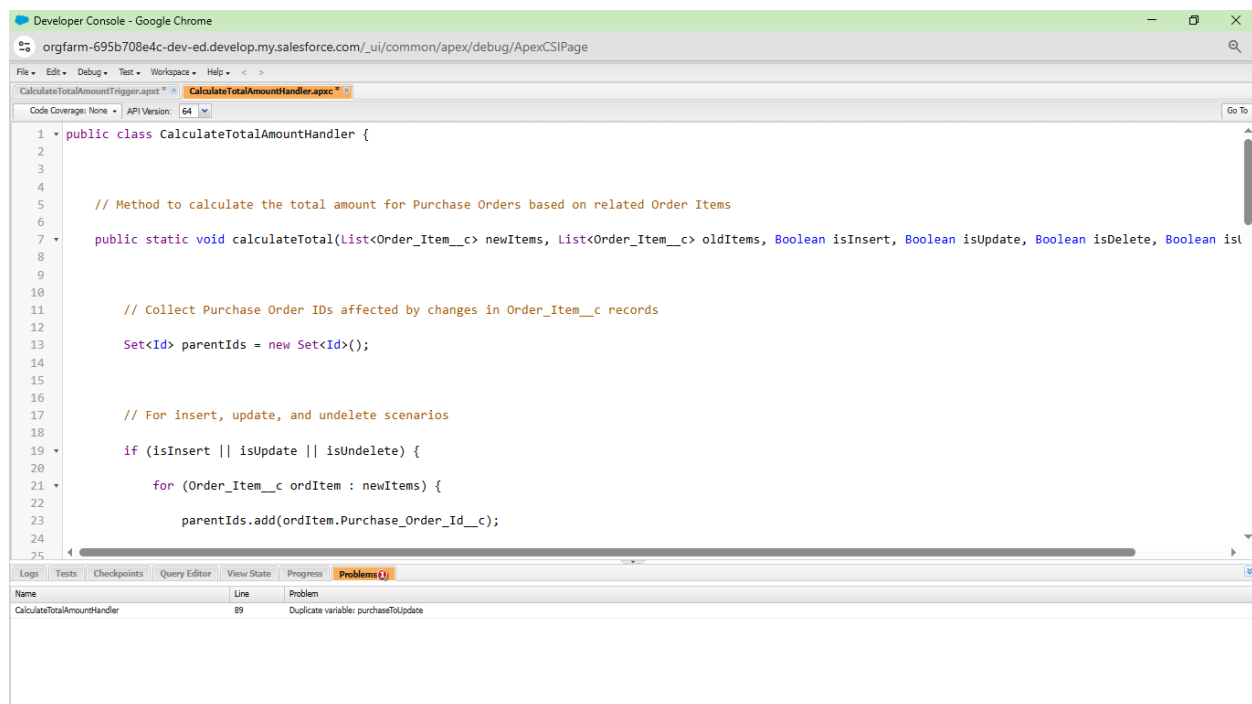
Action	Permission Set Name	Description	License
Clone	Partner Connect Partner Admin Setup	Set up Partner Connect from a partner org. Partner Connect...	Salesforce
Clone	Payments Administrator	Has all the user permissions to gate access to APIs that are ...	Salesforce Payments Internal
Clone	Prompt Template Manager	Manage prompt templates using Prompt Builder and run the...	Einstein Prompt Templates
Clone	Prompt Template User	Run prompt templates using generative AI features.	Einstein Prompt Templates
Clone	PromptTemplatePermSet		Cloud Integration User
Clone	Publish Suggested for You Nudges: Integration User	Access the Core Adoption Service and tenant orgs, which ar...	Cloud Integration User

1-6 of 6 0 Selected Previous Next Page 1 of 1

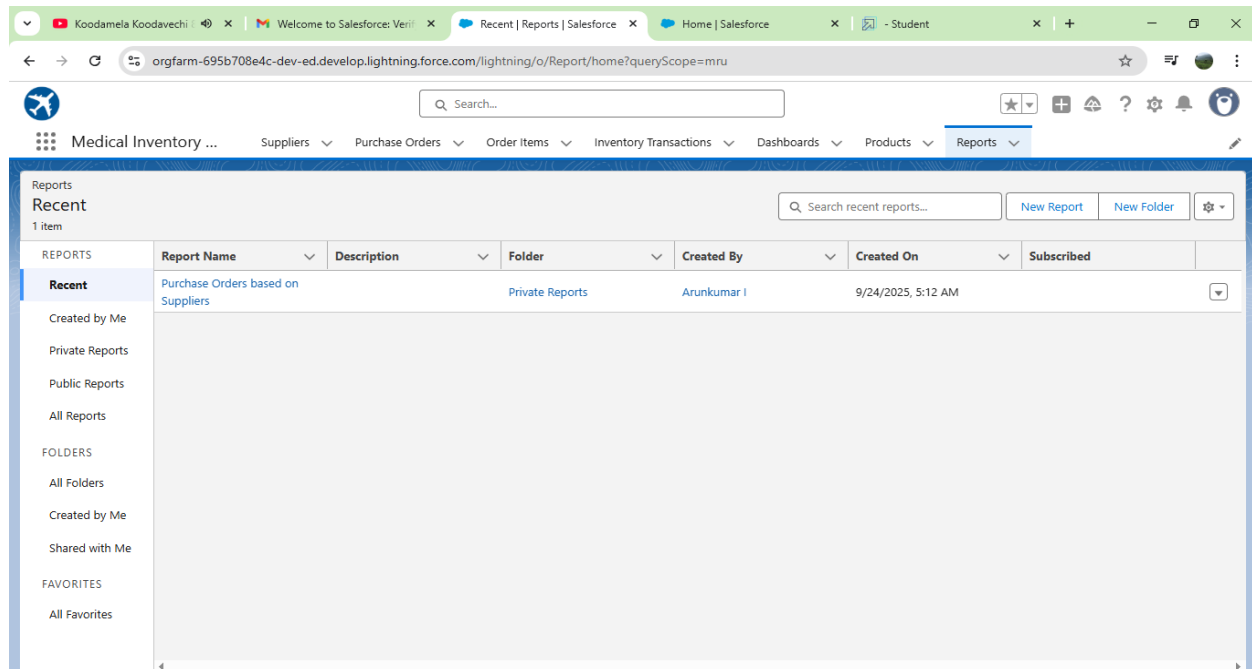
Create Flow To Update The Actual Delivery Date



Create A trigger To Calculate Total Amount On



Create A Purchase Orders Based On Suppliers



CONCLUSION:

The Medical Inventory Management System In Salesforce helps to easily manage suppliers, purchase orders, products, and expiry dates. By using objects, fields, page layouts, validation rules, flows, and triggers, the system ensures smooth operation and accurate data handling. With profiles, roles, and permission sets, stock levels, Supplier performance, and transactions.

This project gives practical knowledge of Salesforce concepts like object creation, security, automation, and reporting. It shows how Salesforce can be used not only as a CRM tool but also as a complete solution for managing real-world business needs such as medical inventory.