

# Medical Inventory Management

College Name:CHIKKANNA GOVERNMENT ARTS COLLEGE

College Code: Bru06

TEAM ID:384054F20E04EC0889E42C9FA297D025

TEAM MEMBERS:

- Team Leader: ARUNKUMAR I  
Email: akarun2848@gmail.com
- Team Member: ASHADULLAH J  
Email: ashushararoc@gmail.com
- Team Member: ANDICHAMY K  
Email:andichamy910@gmail.com
- Team Member: BALAJI P  
Email:balajibala9052006@gmail.com

INTRODUCTION:

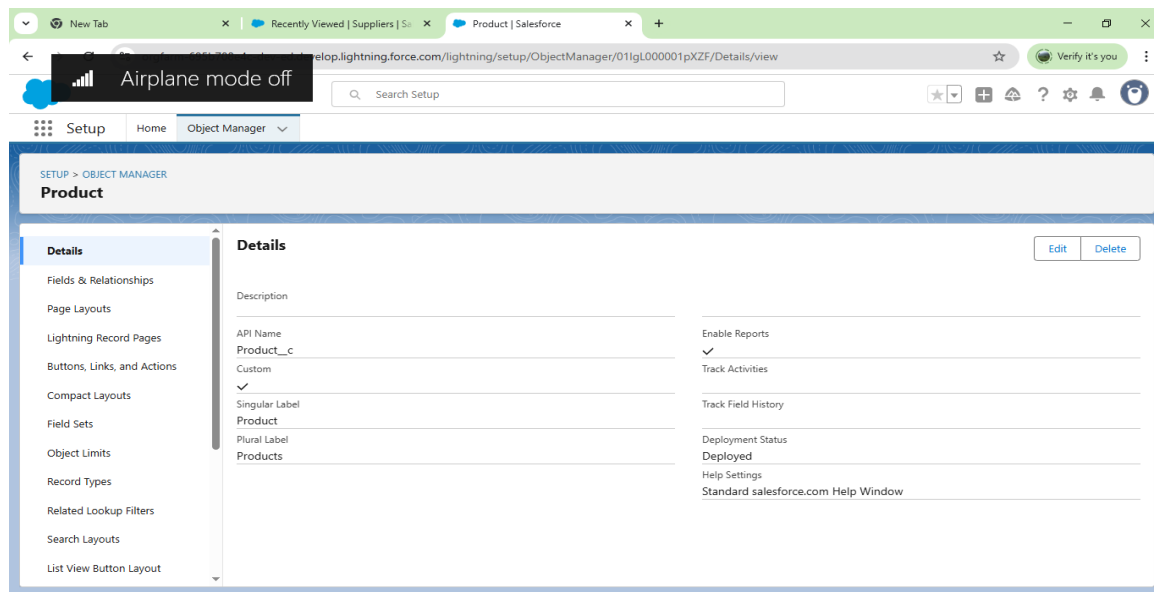
The Medical Inventory Management System is a comprehensive Salesforce application designed to streamline and manage various operational aspects of the medical inventory. It can efficiently maintain supplier details, manage purchase orders, track product details and transactions, and monitor expiry dates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

https://orgfarm-695b708e4c-dev-ed.develop.lightning.force.com/one/app#/setup/ObjectManager/01lgL000001pa45/LightingPages/view

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

**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  
Inventory\_Transaction\_\_c

Custom  
✓

Singular Label  
Inventory Transaction

Plural Label  
Inventory Transactions

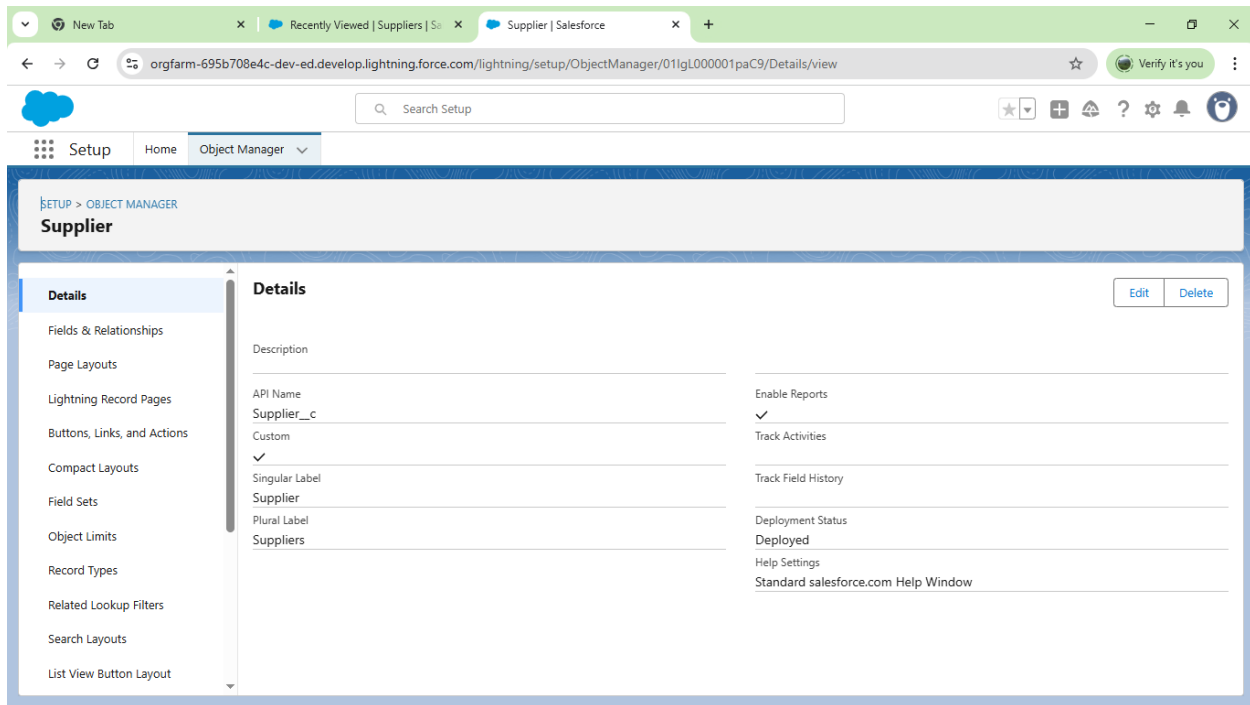
Enable Reports  
✓

Track Activities

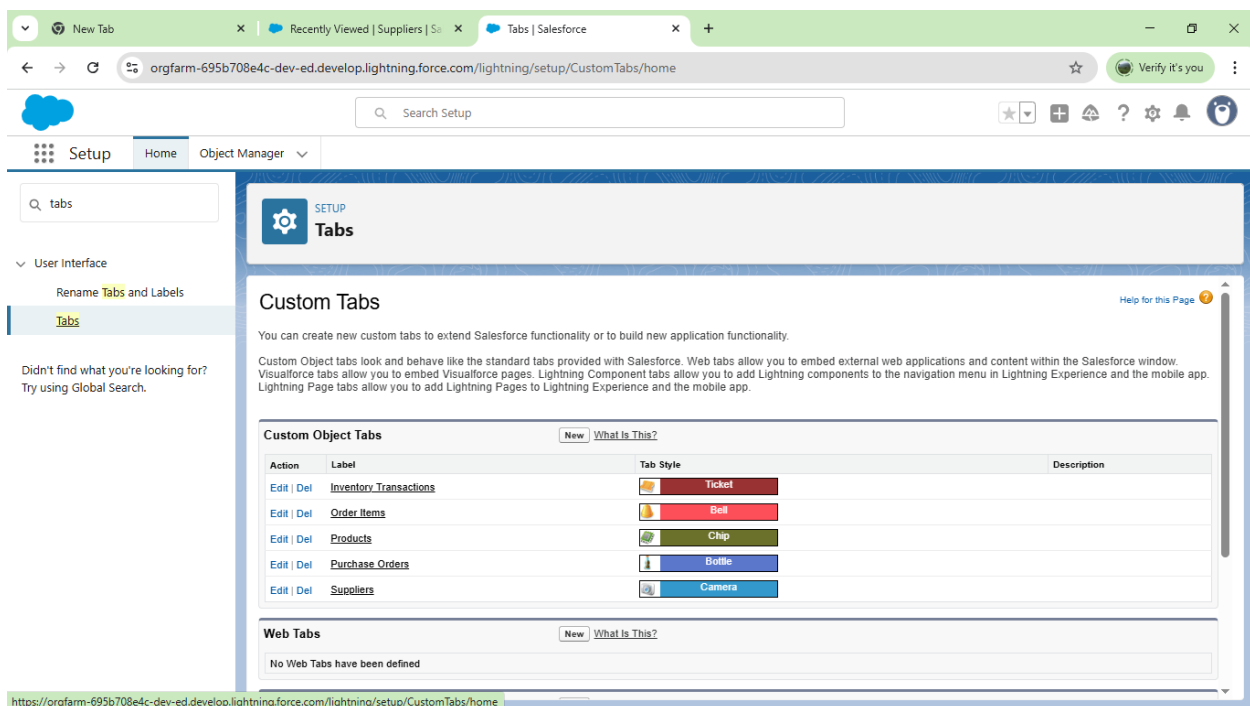
Track Field History

Deployment Status  
Deployed

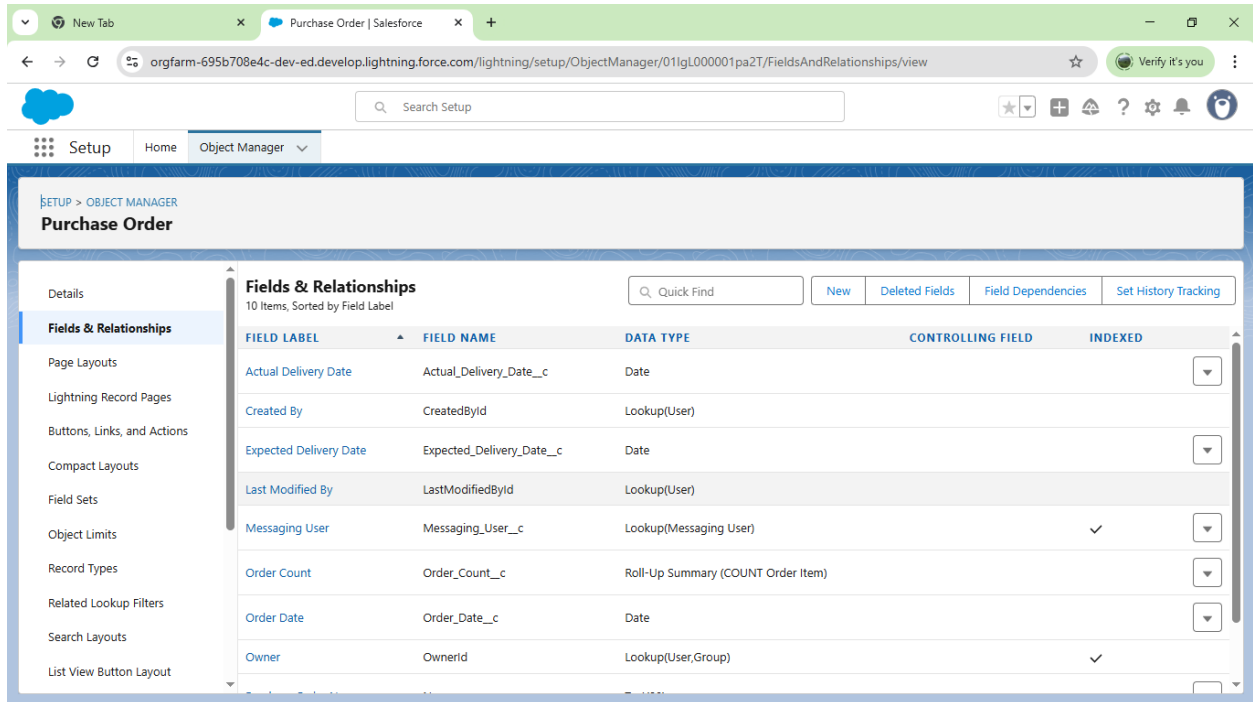
Help Settings  
Standard salesforce.com Help Window



# Create a Tab For Object

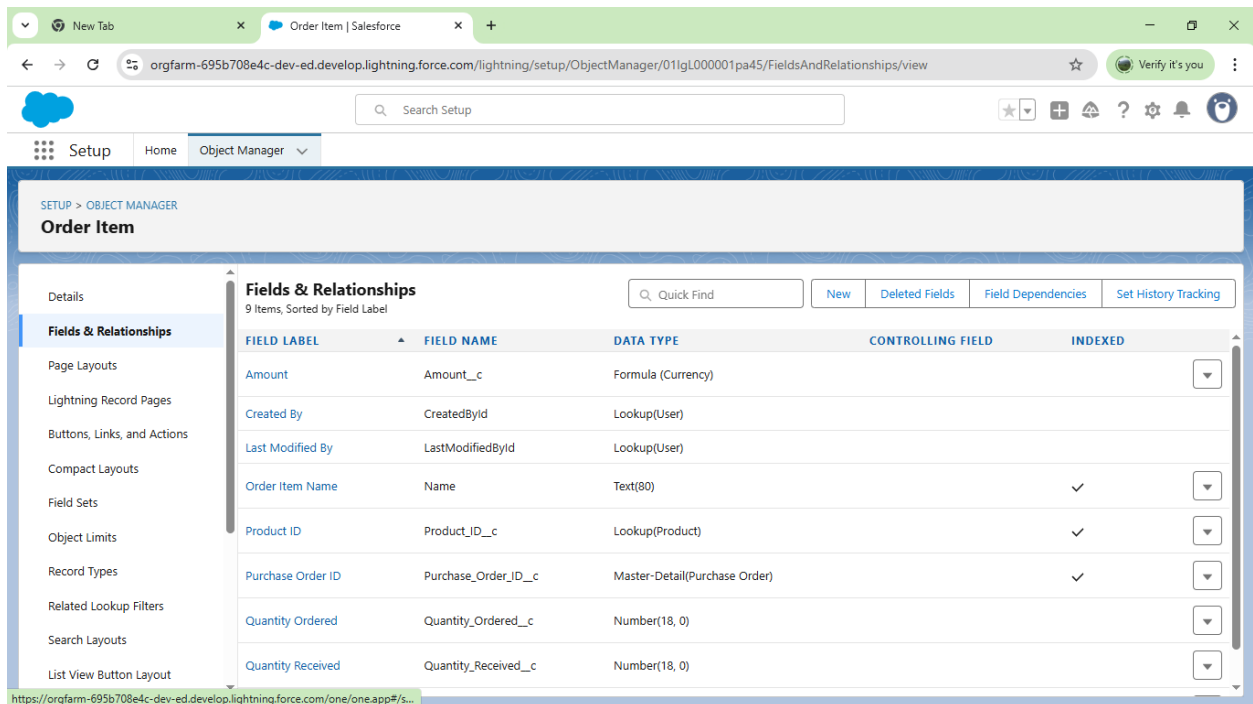


# Configure fields and relationship



The screenshot shows the Salesforce Setup page for the 'Purchase Order' object. The left sidebar contains a navigation menu with options like 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, and List View Button Layout. The main content area is titled 'Fields & Relationships' and shows a list of 10 fields. The fields are sorted by Field Label. The table has columns for FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The fields listed are: Actual Delivery Date (Date), Created By (Lookup(User)), Expected Delivery Date (Date), Last Modified By (Lookup(User)), Messaging User (Lookup(Messaging User)), Order Count (Roll-Up Summary (COUNT Order Item)), Order Date (Date), and Owner (Lookup(User,Group)).

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 like 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, and List View Button Layout. The main content area is titled 'Fields & Relationships' and shows a list of 9 fields. The fields are sorted by Field Label. The table has columns for FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The fields listed are: Amount (Formula (Currency)), Created By (Lookup(User)), Last Modified By (Lookup(User)), Order Item Name (Text(80)), Product ID (Lookup(Product)), Purchase Order ID (Master-Detail(Purchase Order)), Quantity Ordered (Number(18, 0)), and Quantity Received (Number(18, 0)).

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 includes a 'Supplier Layout' dropdown menu. Below this, there are tabs for 'Save', 'Quick Save', 'Preview As...', 'Cancel', 'Undo', 'Redo', and 'Layout Properties'. A 'Quick Find' search bar is present. The 'Fields' section lists various fields: Email, Supplier Name, Last Modified By, Address, Owner, Created By, and Phone Number. Below the fields, there is a 'Supplier Sample' section, a 'Highlights Panel' with a text input field, and a 'Quick Actions in the Salesforce Classic' section with a 'Publisher' link. The bottom of the page shows a URL bar with the address: https://orgfarm-695b708e4c-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01gL000001paC9/PageLayouts/00hgL000006TEQ:QAO/view.

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 includes a 'Compact Layouts' section. Below this, there are tabs for 'New' and 'Compact Layout Assignment'. A 'Quick Find' search bar is present. The 'Compact Layouts' section displays a table with the following data:

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

The bottom of the page shows a URL bar with the address: https://orgfarm-695b708e4c-dev-ed.develop.lightning.force.com/one/one.app#/x/...

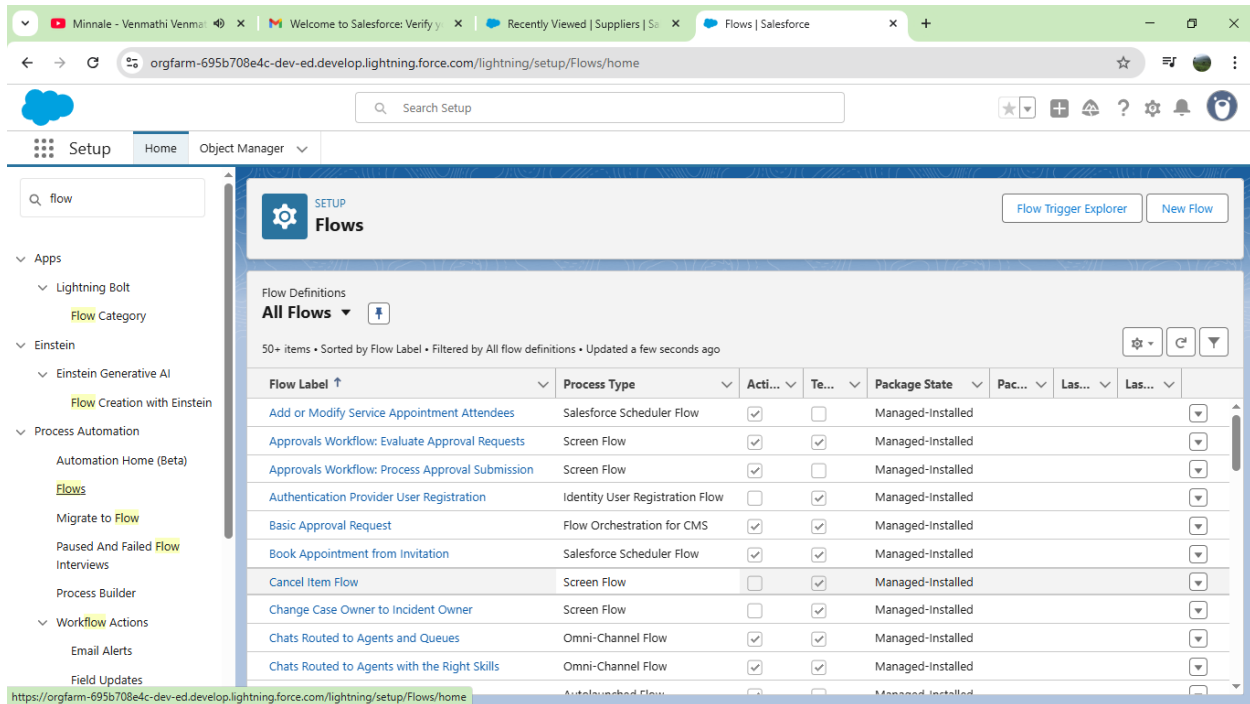
# To Create Profiles

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: '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.' Below this, there are links for various settings like 'Login IP Ranges', 'Enabled Apex Class Access', etc. The 'Profile Detail' section shows the 'Name' as 'Standard User', 'User License' as 'Salesforce', and 'Created By' as 'salesforce.com, inc., 6/21/2025, 11:37 AM'. The 'Page Layouts' section lists various layouts for different objects, including 'Global Layout', 'Email Application', 'Home Page Layout', 'Account Layout', 'Location Group Assignment Layout', 'Macro Layout', 'Object Milestone Layout', and 'Operating Hours Layout'.

## 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: 'On this page you can create, view, and manage permission sets.' Below this, there are links for 'All Permission Sets', 'Edit', 'Delete', and 'Create New View'. A table lists several permission sets, including 'Partner Connect Partner Admin Setup', 'Payments Administrator', 'Promot Template Manager', 'Promot Template User', 'Promot Template PermSet', and 'Publish Suggested for You Nudges Integration User'. The table has columns for 'Action', 'Permission Set Name', 'Description', and 'License'. The bottom of the page shows a pagination bar with '1-6 of 6' and '0 Selected'.

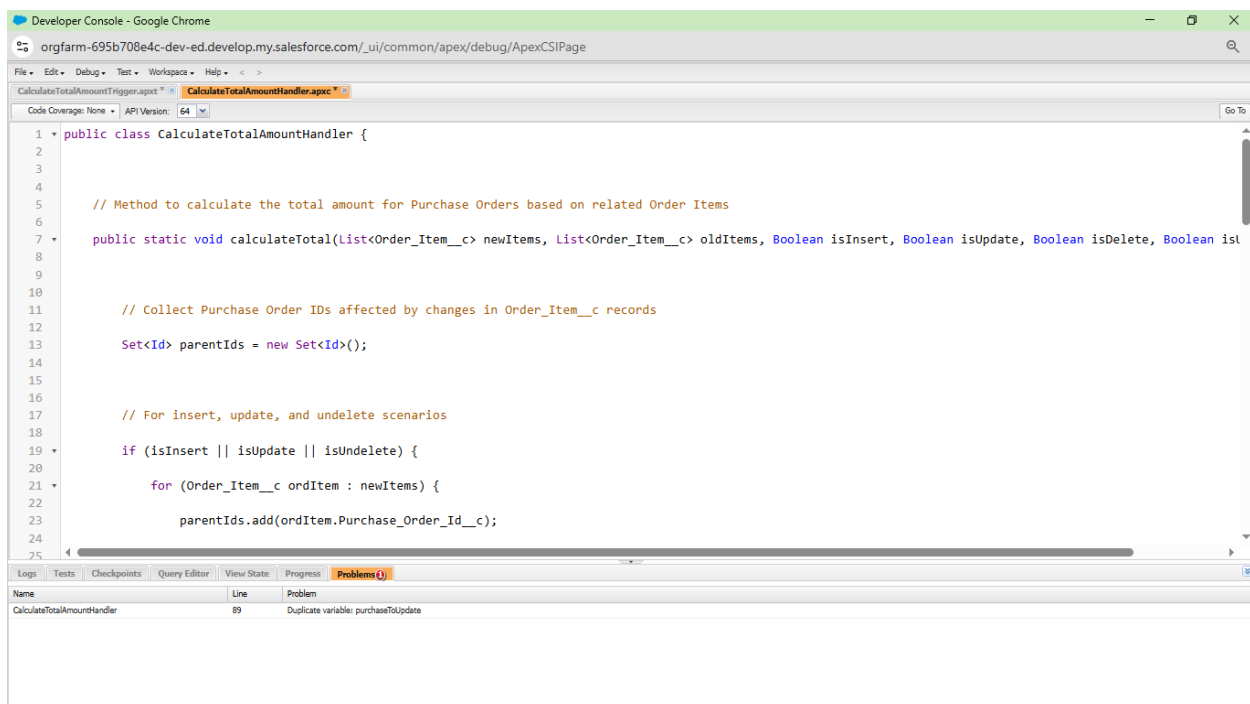
# Create Flow To Update The Actual Delivery Date



The screenshot shows the Salesforce Setup interface. The left sidebar contains a navigation menu with the following items: Apps, Lightning Bolt, Flow Category, Einstein, Einstein Generative AI, Flow Creation with Einstein, Process Automation, Automation Home (Beta), Flows, Migrate to Flow, Paused And Failed Flow Interviews, Process Builder, Workflow Actions, Email Alerts, and Field Updates. The 'Flows' item is highlighted. The main content area is titled 'Flows' and shows a list of flow definitions. The list has columns for Flow Label, Process Type, Action, Test, Package State, and several other columns. The flows listed include 'Add or Modify Service Appointment Attendees', 'Approvals Workflow: Evaluate Approval Requests', 'Approvals Workflow: Process Approval Submission', 'Authentication Provider User Registration', 'Basic Approval Request', 'Book Appointment from Invitation', 'Cancel Item Flow', 'Change Case Owner to Incident Owner', 'Chats Routed to Agents and Queues', and 'Chats Routed to Agents with the Right Skills'.

Flow Label	Process Type	Action	Test	Package State
Add or Modify Service Appointment Attendees	Salesforce Scheduler Flow	✓	✓	Managed-Installed
Approvals Workflow: Evaluate Approval Requests	Screen Flow	✓	✓	Managed-Installed
Approvals Workflow: Process Approval Submission	Screen Flow	✓	✓	Managed-Installed
Authentication Provider User Registration	Identity User Registration Flow	✓	✓	Managed-Installed
Basic Approval Request	Flow Orchestration for CMS	✓	✓	Managed-Installed
Book Appointment from Invitation	Salesforce Scheduler Flow	✓	✓	Managed-Installed
Cancel Item Flow	Screen Flow	✓	✓	Managed-Installed
Change Case Owner to Incident Owner	Screen Flow	✓	✓	Managed-Installed
Chats Routed to Agents and Queues	Omni-Channel Flow	✓	✓	Managed-Installed
Chats Routed to Agents with the Right Skills	Omni-Channel Flow	✓	✓	Managed-Installed

# Create A trigger To Calculate Total Amount On



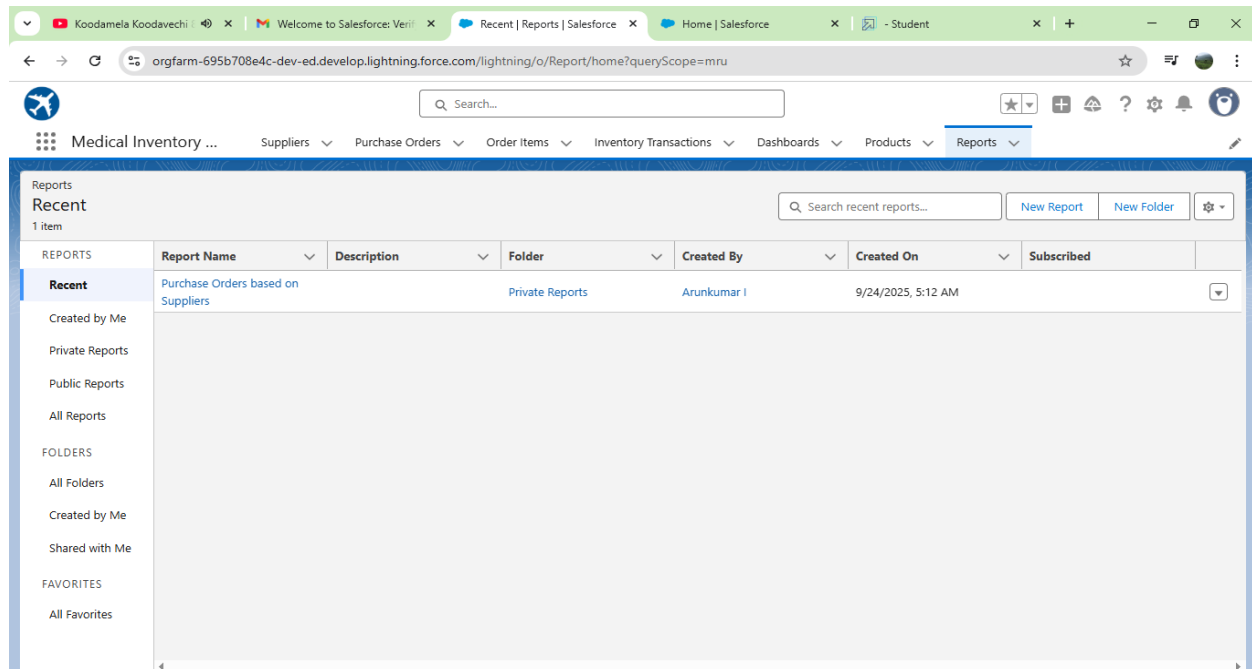
The screenshot shows the Salesforce Developer Console. The top bar indicates the current page is 'ApexCSIPage'. The left sidebar shows the 'CalculateTotalAmountHandler.apex' file. The main editor displays the following Apex code:

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

The bottom of the console shows a 'Problems' tab with a single error: 'Duplicate variable: purchaseToUpdate' at line 89.



# 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.