

# Medical Inventory Management

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## INTRODUCTION:

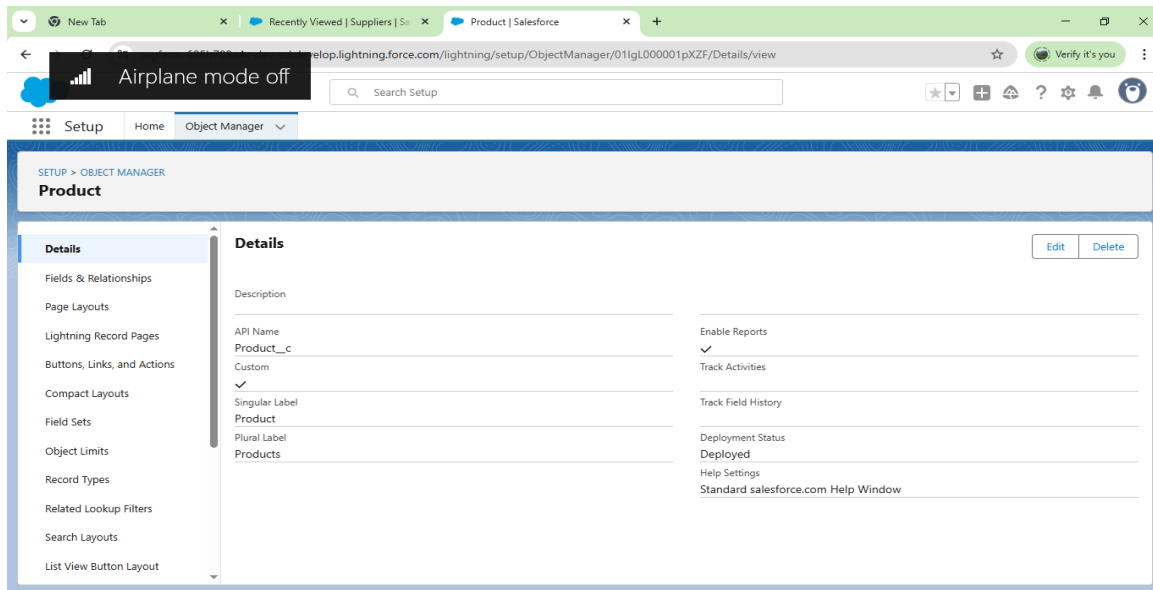
The Medical Inventory Management System is a comprehensive Salesforce application designed to streamline and manage various operational aspects of the medical inventory. It can efficiently maintain supplier details, manage purchase orders, track product details and transactions, and monitor expiry dates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

**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

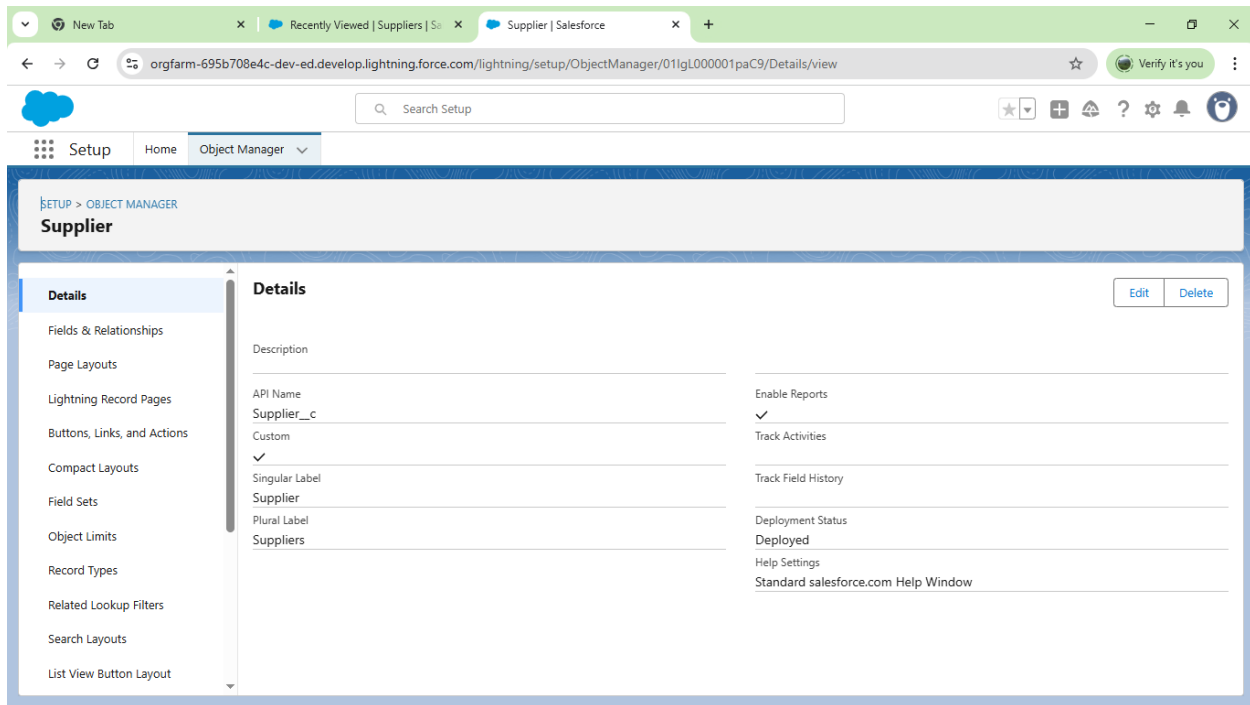
Enable Reports  
✓

Track Activities

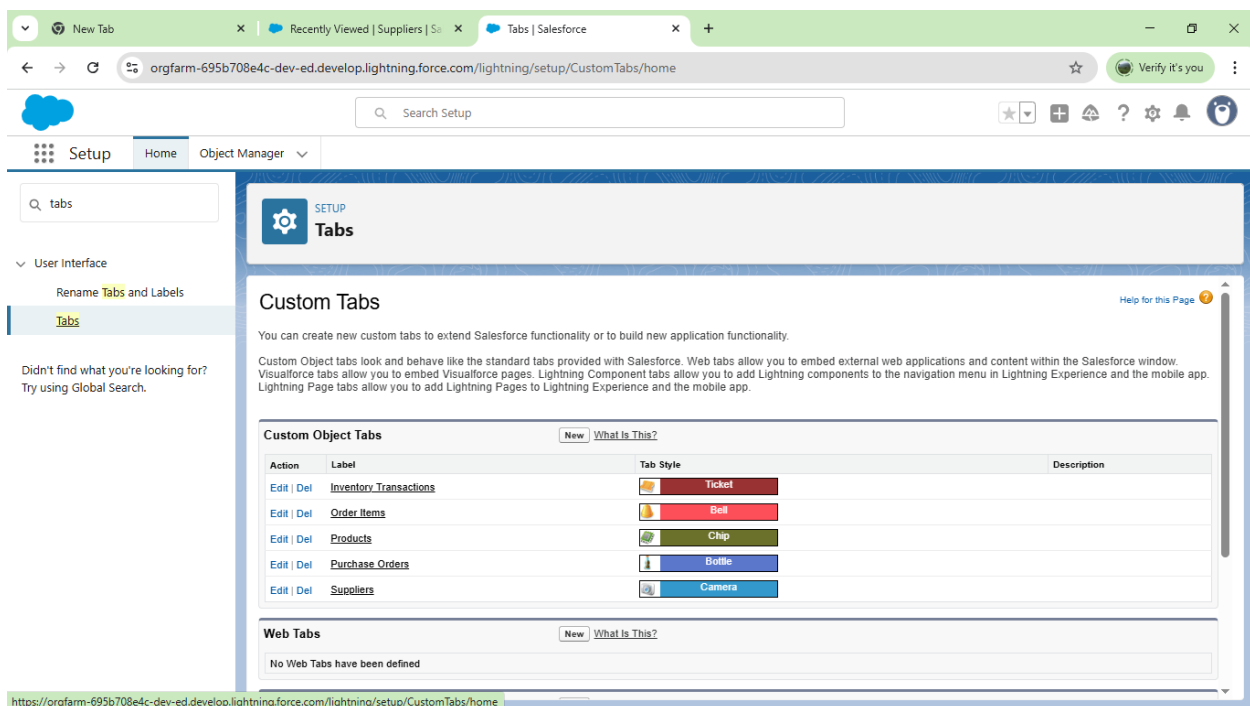
Track Field History

Deployment Status  
Deployed

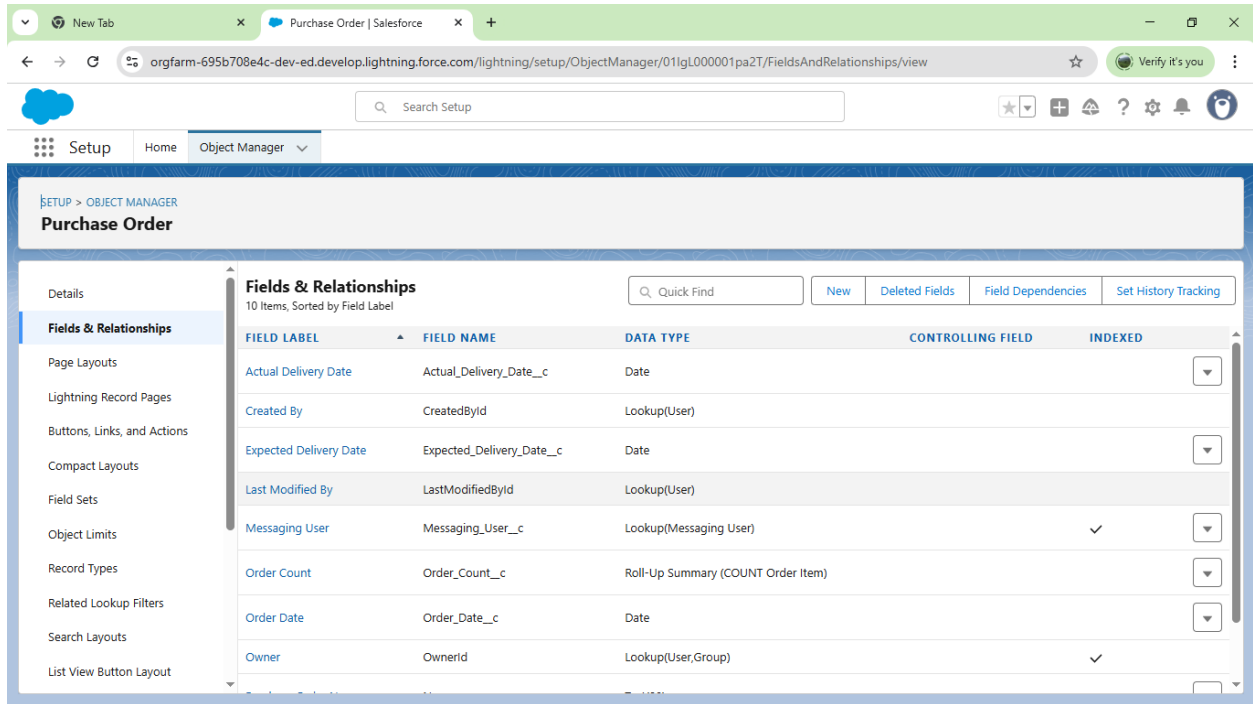
Help Settings  
Standard salesforce.com Help Window



# Create a Tab For Object

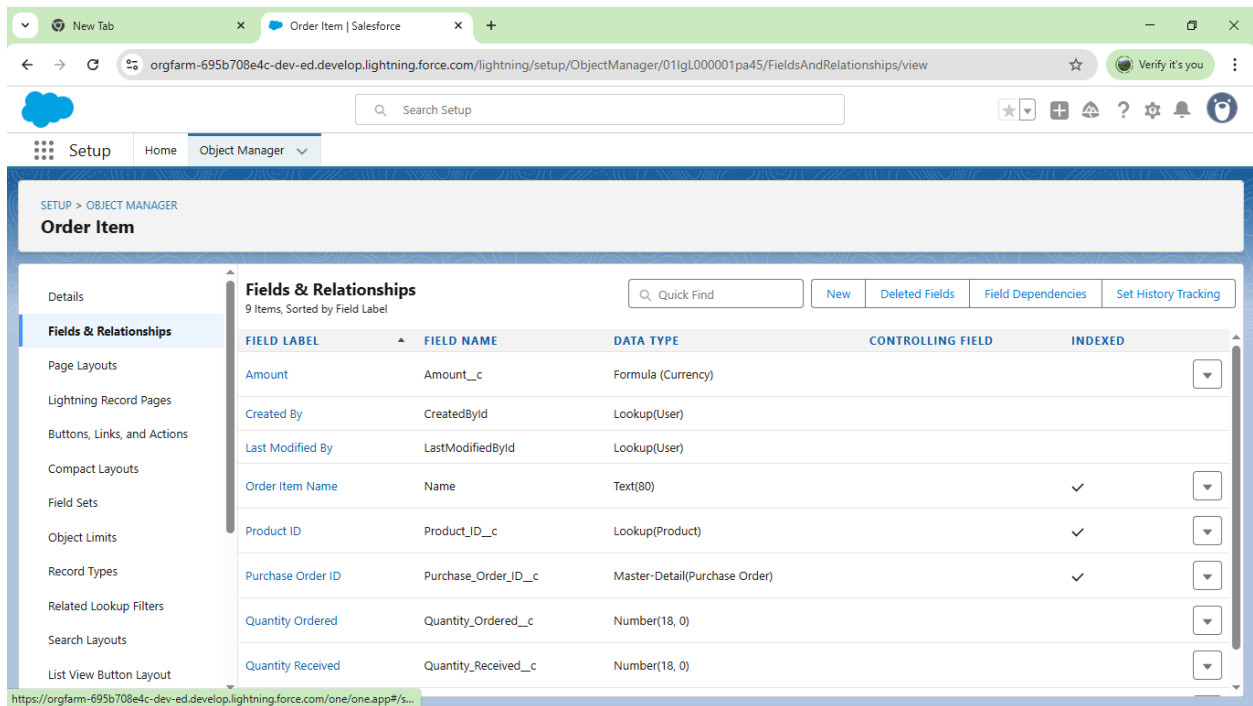


# Configure fields and relationship



The screenshot shows the Salesforce Setup interface 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 displays 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 (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 interface 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 displays 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 (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 shows the 'Supplier Layout' configuration. At the top, there are tabs for 'Save', 'Quick Save', 'Preview As...', 'Cancel', 'Undo', 'Redo', and 'Layout Properties'. Below these is a 'Quick Find' search bar. The 'Fields' section on the left lists: Buttons, Quick Actions, Mobile & Lightning Actions, Expanded Lookups, Related Lists, and Report Charts. The 'Fields' table on the right contains the following data:

Field Name	Field Name
Section	Email
Blank Space	Last Modified By
Address	Owner
Created By	Phone Number

Below the fields table, there is a 'Supplier Sample' section, a 'Highlights Panel' with a text input field 'Customize the highlights panel for this page layout...', and a 'Quick Actions in the Salesforce Classic' section for the 'Publisher' role. A note states: '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. At the top, there are tabs for 'Quick Find', 'New', and 'Compact Layout Assignment'. Below these is a table with the following data:

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: '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 the description is a list of enabled features: 'Login IP Ranges', 'Enabled Apex Class Access', 'Enabled Visualforce Page Access', 'Enabled External Data Source Access', 'Enabled Named Credential Access', 'Enabled External Credential Principal Access', 'Enabled Custom Metadata Type Access', 'Enabled Custom Setting Definitions Access', 'Enabled Flow Access', 'Enabled Service Presence Status Access', and 'Enabled Custom Permissions'.

The 'Profile Detail' section includes buttons for 'Edit', 'Clone', and 'View Users'. It lists the following information:

- Name: Standard User
- User License: Salesforce
- Created By: salesforce.com, inc., 6/21/2025, 11:37 AM
- Modified By: Anunkumar, 9/22/2025, 4:16 AM

The 'Page Layouts' section is titled 'Standard Object Layouts' and lists the following layouts:

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

A small JavaScript error message is visible at the bottom left: 'javascriptsrcUp(%27%2F00egL000002Zjky%3Fisdtp%3Dp1%27);'.

## Create a Permission Set

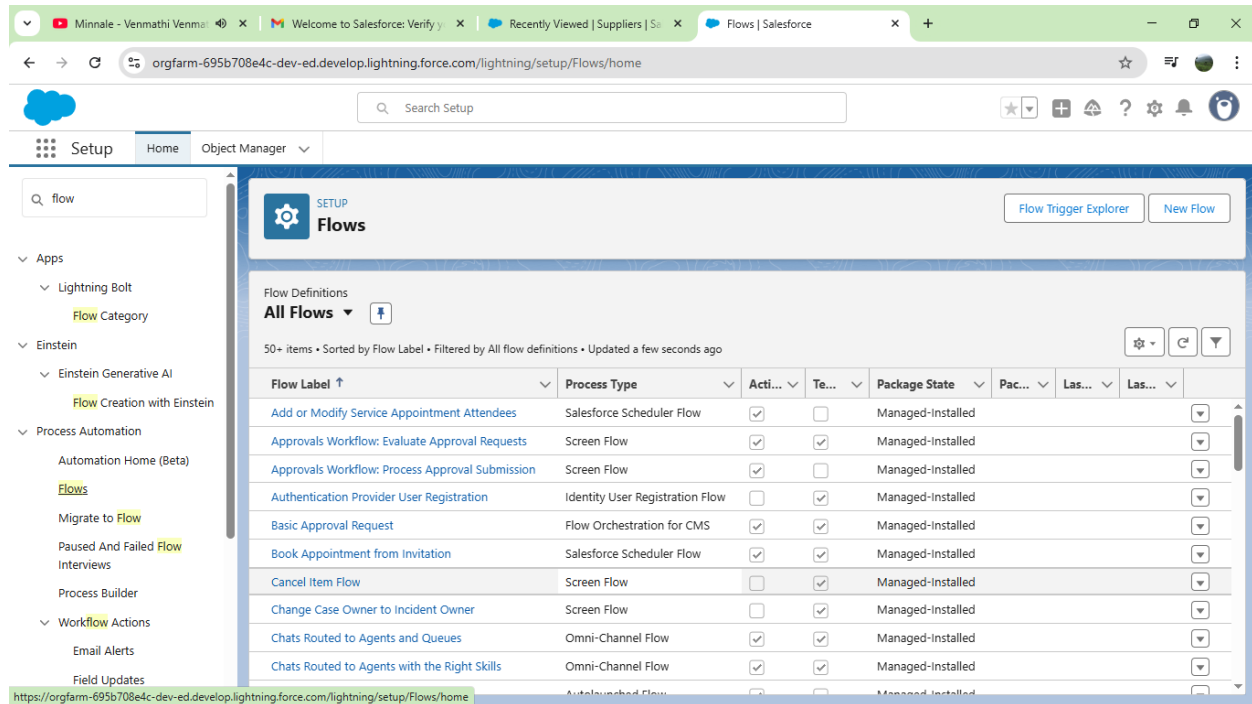
The screenshot shows the Salesforce Setup interface for the 'Permission Sets' section. The left sidebar contains a search bar with 'permission sets' entered and a navigation menu with 'Users' and 'Permission Sets' (selected). The main content area is titled 'Permission Sets' and includes a description: 'On this page you can create, view, and manage permission sets.'

Below the description is a table listing the permission sets. The table has columns for 'Action', 'Permission Set Name', 'Description', and 'License'. The table is sorted by 'Permission Set Name' in ascending order.

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

The table is displayed on a single page, with 1-6 of 6 items shown. The page number is 1 of 1.

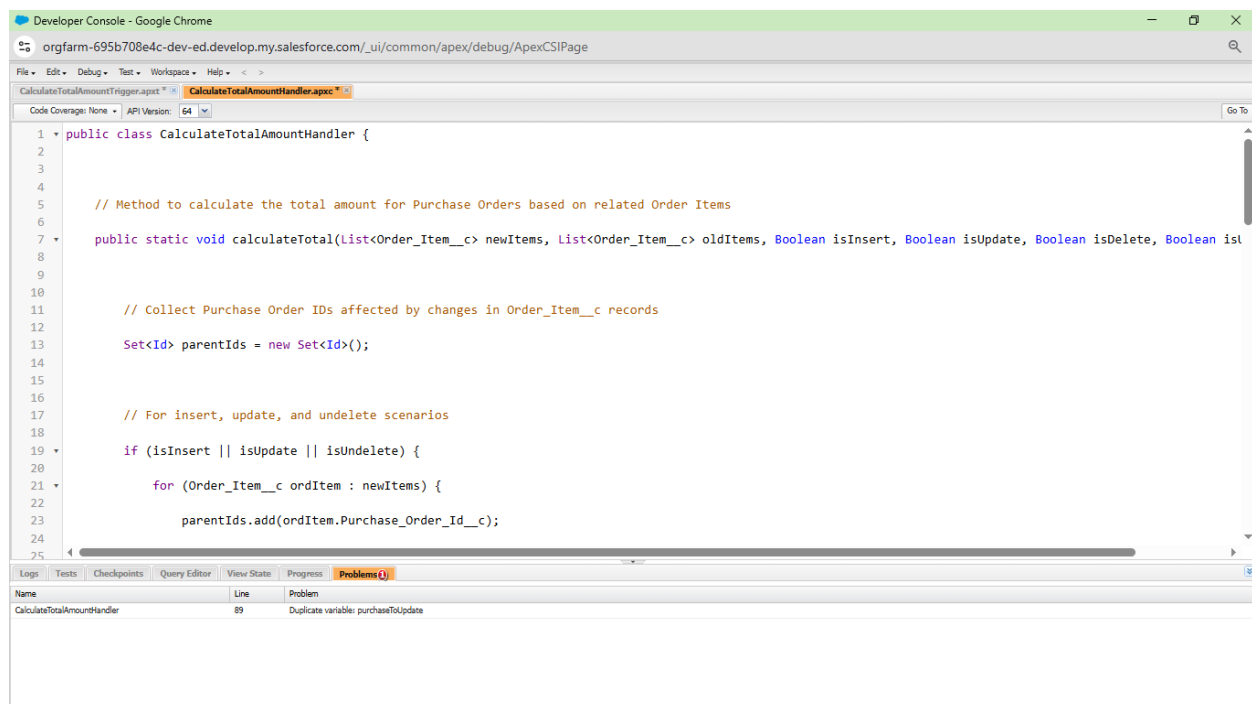
# Create Flow To Update The Actual Delivery Date



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



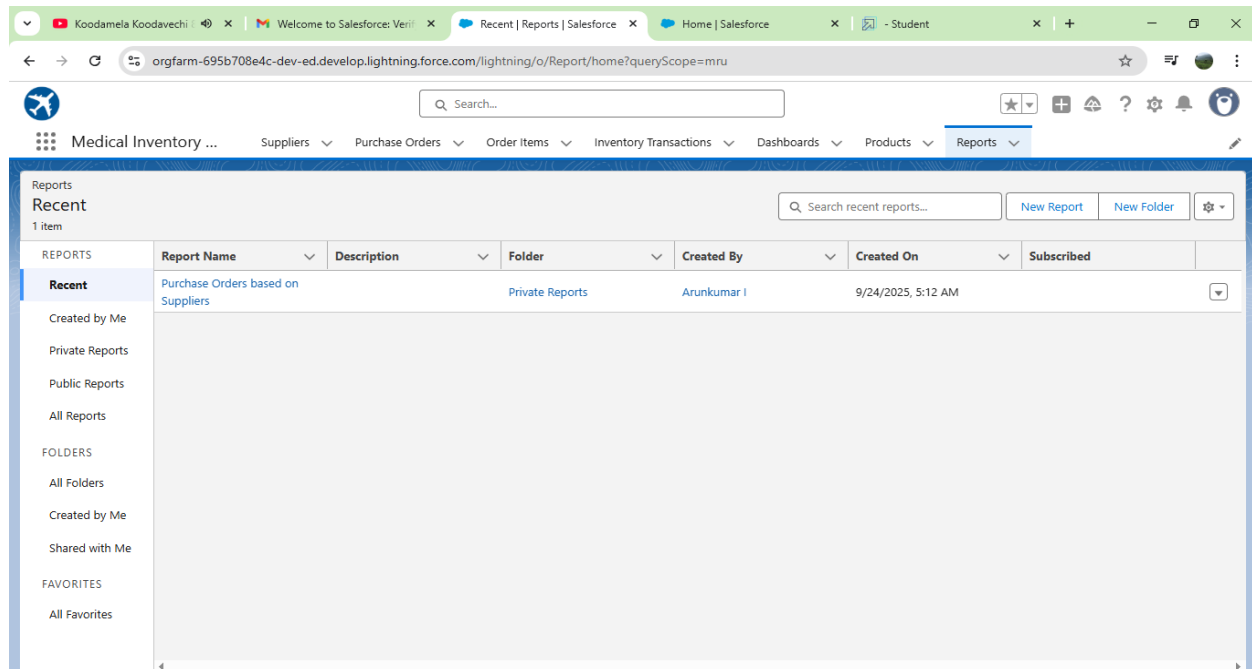
The screenshot shows the Salesforce Developer Console. The top bar indicates the current page is 'ApexCSIPage'. The left sidebar shows the 'CalculateTotalAmountHandler.apex' file. The main editor displays the following Apex code:

```
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 warning message: '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.