

PROJECT TITLE:

Medical Inventory Management

College Name:

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College Code:

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Medical Inventory Management Project Documentation

1. Project Overview

The **Medical Inventory Management System** is a Salesforce application designed to streamline the process of managing medical inventory. It helps track suppliers, products, purchase orders, order items, and inventory transactions in a single platform.

This system improves:

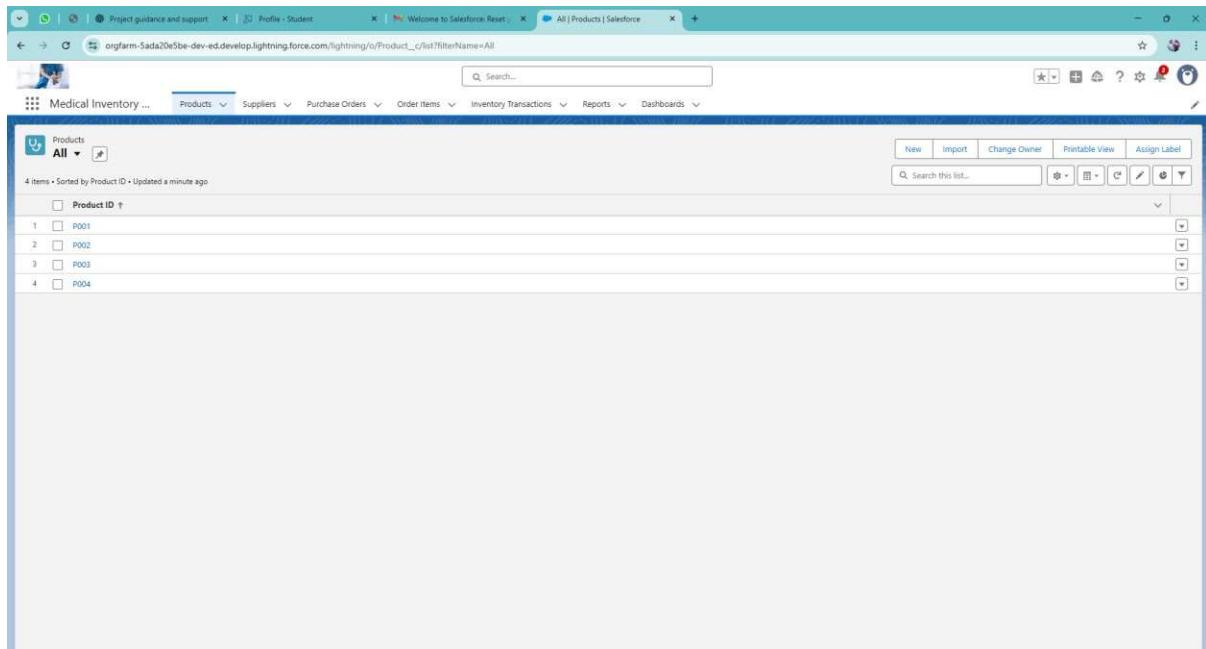
- Supplier tracking
- Stock level monitoring
- Order management
- Expiry date tracking
- Report generation and analytics

2. Objectives

The main objectives of this project are:

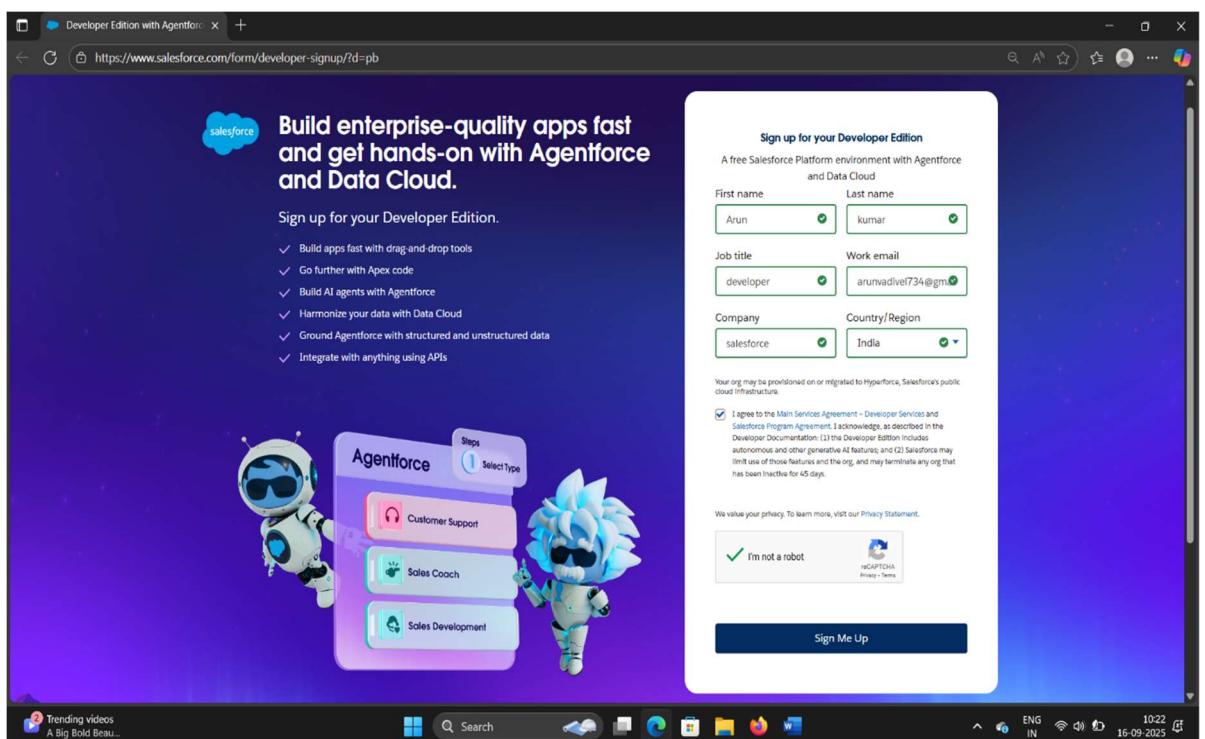
1. To efficiently manage and track **medical products** and their **stock levels**.
2. To streamline the **purchase order process** by linking suppliers and products.
3. To ensure **real-time monitoring** of stock and expiry dates.
4. To generate **insightful reports and dashboards** for decision-making.
5. To automate repetitive tasks using Salesforce tools like **flows and validation rules**.

Medical Inventory Management App.



3. Created a developer org in salesforce.

1. Go to <https://developer.salesforce.com/signup>
2. On the sign up form, enter the following details :



3.

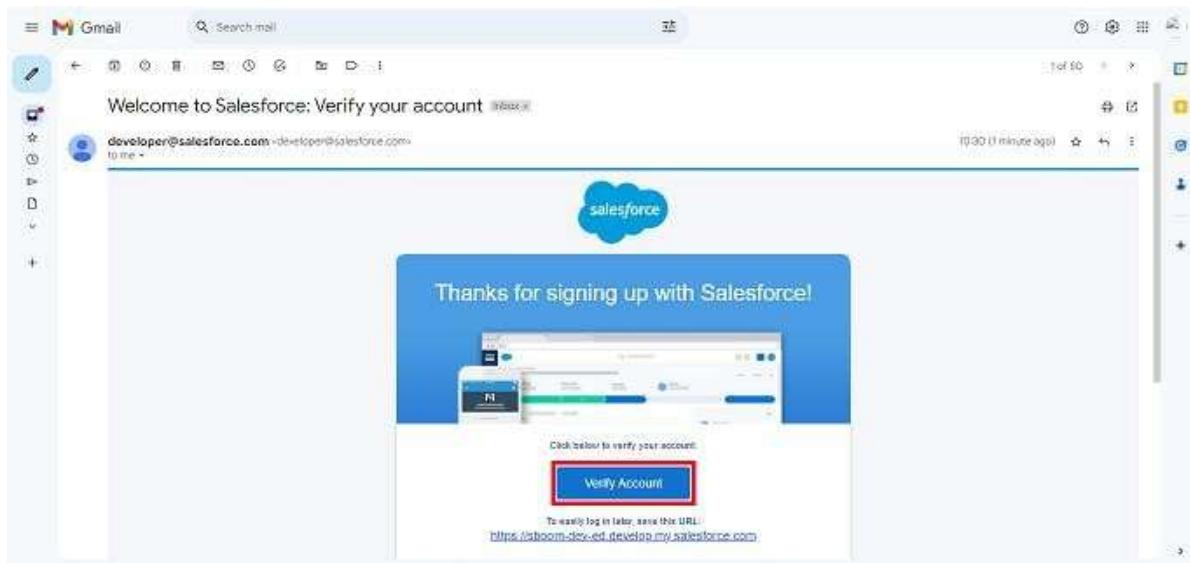
1. First name & Last name
2. Email

3. Role : Developer
4. Company : College Name
5. County : India
6. Postal Code : pin code

Click on sign me up after filling these.

4. Account Activation

1. Go to the inbox of the email that you used while signing up. Click on the verify account to activate your account. The email may take 5-10mins.



2. Click on Verify Account
3. Give a password and answer a security question and click on change password.

Change Your Password

Enter a new password for lead@sb.oom.
Make sure to include at least:

- 8 characters
- 1 letter
- 1 number

* New Password
..... Good

* Confirm New Password
..... Match

Security Question
In what city were you born?

* Answer
asdfgjnik

Change Password

4. Then you will redirect to your salesforce setup page.

Setup

Home Object Manager

SETUP Home

Get Started with Einstein Bots

Mobile Publisher

Real-time Collaborative Docs

Service Setup Assistant

Multi-Factor Authentication Assistant

Release Updates

Lightning Experience Transition Assistant

Salesforce Mobile App

Lightning Usage

Optimizer

ADMINISTRATION

> Users

5. Objects Created

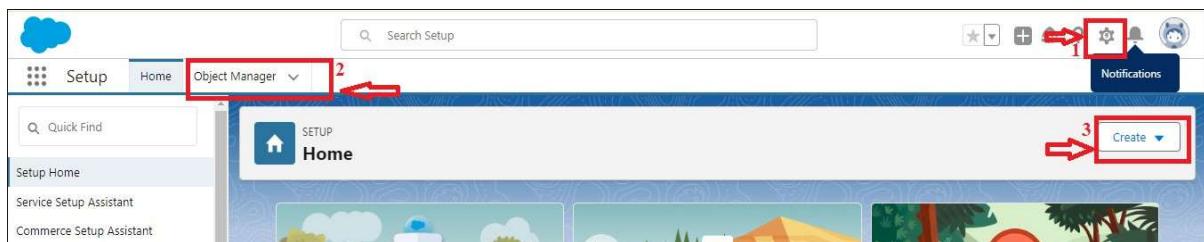
The following **custom objects** were created to manage the system:

Object Name	Purpose
Supplier	To store supplier details like name, contact person, phone, and address.

Object Name	Purpose
Product	To store product information like unit price, current stock level, and minimum stock level.
Purchase Order	To record order details from suppliers.
Order Item	To link products with each purchase order and track quantities and costs.
Inventory Transaction	To track stock movement (Inbound/Outbound).
In Salesforce, objects are database tables that allow you to store data specific to your organization.	

To create an object:

1. From the setup page
2. 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



The screenshot shows the 'Custom Object Definition Edit' screen in the Salesforce Setup. The object is named 'Product'. Key fields highlighted with red boxes are:

- Label:** Product (4)
- Plural Label:** Products (5)
- Record Name:** Product ID (6)
- Data Type:** Text (7)
- Optional Features:** Allow Reports (8) is checked.
- Search Status:** Allow Search (9) is checked.

At the bottom, the 'Save & New' button is highlighted with a red box (10).

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

6. Tabs Created

In Salesforce, tabs are used to make the data stored in objects accessible to users through the user interface. Tabs are a fundamental part of the Salesforce interface, providing a way to navigate to different objects and records.

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

Q. tab 1

Setup Home Object Manager ▾

SETUP Tabs

Custom Tabs Help for this Page ⓘ

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.

Custom Object Tabs 3 New What Is This?

No Custom Object Tabs have been defined

Web Tabs New What Is This?

No Web Tabs have been defined

Visualforce Tabs New What Is This?

No Visualforce Tabs have been defined

Activate Windows

SETUP Tabs

Step 1 of 3

Step 1. Enter the Details

Choose the custom object for this new custom tab. Fill in other details.

Select an existing custom object or [Create a New Standard Object](#)

Object Product ▾

Tab Style Stethoscope 🔍 4

(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 5

Next Cancel

- Now created the Tabs for the remaining Objects, they are “Purchase Order, Order Item, Inventory Transaction, Supplier”.
- Followed the same steps as mentioned in above.

The screenshot shows the Salesforce Setup interface with the 'Custom Tabs' page open. The left sidebar includes 'User Interface' and 'Tabs' under 'Object Manager'. The main content area is titled 'Custom Tabs' and contains a table for 'Custom Object Tabs'. The table has columns for 'Action', 'Label', 'Tab Style', and 'Description'. It lists five tabs: 'Inventory Transactions' (Stethoscope), 'Order Items' (Stethoscope), 'Products' (Stethoscope), 'Purchase Orders' (Stethoscope), and 'Suppliers' (Stethoscope). Below this table are sections for 'Web Tabs', 'Visualforce Tabs', 'Lightning Component Tabs', and 'Lightning Page Tabs', each stating 'No [tab type] have been defined'.

7. Created a Lightning App for Medical Inventory Management

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

New Lightning App

App Details

*App Name Medical Inventory Management

*Developer Name Medical_Inventory_Management

Description Enter a description...

App Branding

Image 3

Primary Color Hex Value #0070D2

Org Theme Options Use the app's image and color instead of the org's custom theme

App Launcher Preview

Next

Navigation Items

Choose the items to include in the app, and arrange the order in which they appear. Users can personalize the navigation to add or move items, but users can't remove or rename the items that you add. Some navigation items are available only for phone or only for desktop. These items are dropped from the navigation bar when the app is viewed in a format that the item doesn't support.

New Lightning App

User Profiles

Choose the user profiles that can access this app.

Available Profiles 7

System Administrator

Selected Profiles

Save & Finish 8

8. Created a Text Field in Product 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 image consists of two screenshots of the Salesforce Setup interface.

Top Screenshot: Shows the Object Manager page. The 'Object Manager' tab is selected (highlighted with a red box). A row for 'Product' is selected (highlighted with a red box) and has a red number '3' over it. The 'API NAME' column shows 'Product_c'. The 'Type' column indicates it is a 'Custom Object'. The 'Last Modified' column shows '18/06/2024'. The 'Deployed' column has a checkmark and a dropdown arrow. The top navigation bar shows 'Setup' and 'Object Manager'.

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		18/06/2024	✓
Product	Product2	Standard Object			
Product Attribute	ProductAttribute	Standard Object			

Bottom Screenshot: Shows the 'Fields & Relationships' section for the Product object. The 'Fields & Relationships' tab is selected (highlighted with a red box). A new button 'New' is highlighted with a red box and has a red number '5' over it. The table lists four fields: 'Created By' (Field Label: 'CreatedBy', Field Name: 'CreatedById', Data Type: 'Lookup(User)'), 'Last Modified By' (Field Label: 'LastModified By', Field Name: 'LastModifiedById', Data Type: 'Lookup(User)'), 'Owner' (Field Label: 'Owner', Field Name: 'OwnerId', Data Type: 'Lookup(User,Group)'), and 'Product ID' (Field Label: 'Product ID', Field Name: 'Name', Data Type: 'Text(80)'). The 'Controlling Field' and 'Indexed' columns show checkmarks for most rows.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedBy	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)	✓	
Product ID	Name	Text(80)	✓	

clicking Send an Email. Note that custom email addresses cannot be used for mass emails.

<input type="radio"/> Geolocation	Allows users to define locations. Includes latitude and longitude components, and can be used to calculate distance.
<input type="radio"/> Number	Allows users to enter any number. Leading zeros are removed.
<input type="radio"/> Percent	Allows users to enter a percentage number, for example, '10' and automatically adds the percent sign to the number.
<input type="radio"/> Phone	Allows users to enter any phone number. Automatically formats it as a phone number.
<input type="radio"/> Picklist	Allows users to select a value from a list you define.
<input type="radio"/> Picklist (Multi-Select)	Allows users to select multiple values from a list you define.
<input checked="" type="radio"/> Text	Allows users to enter any combination of letters and numbers.
<input type="radio"/> Text Area	Allows users to enter up to 255 characters on separate lines.
<input type="radio"/> Text Area (Long)	Allows users to enter up to 131,072 characters on separate lines.
<input type="radio"/> Text Area (Rich)	Allows users to enter formatted text, add images and links. Up to 131,072 characters on separate lines.
<input type="radio"/> Text (Encrypted) 	Allows users to enter any combination of letters and numbers and store them in encrypted form.
<input type="radio"/> Time	Allows users to enter a local time. For example, "2:40 PM", "14:40", "14:40:00", and "14:40:50:600" are all valid times for this field.
<input type="radio"/> URL	Allows users to enter any valid website address. When users click on the field, the URL will open in a separate browser window.

Step 2. Enter the details

Step 2 of 4

Field Label <input type="text" value="Product Name"/> 	7	9
Please enter the maximum length for a text field below.		
Length <input type="text" value="255"/> 	7	
Field Name <input type="text" value="Product"/> 		
Description <input type="text"/>		
Help Text <input type="text"/>		
<input checked="" type="checkbox"/> Required <input checked="" type="checkbox"/> Always require a value in this field in order to save a record 8		
Unique <input type="checkbox"/> Do not allow duplicate values		
<input checked="" type="radio"/> Treat "ABC" and "abc" as duplicate values (case insensitive)		
<input type="radio"/> Treat "ABC" and "abc" as different values (case sensitive)		
External ID <input type="checkbox"/> Set this field as the unique record identifier from an external system		
Auto add to custom report type <input checked="" type="checkbox"/> Add this field to existing custom report types that contain this entity 		

Field Added in Object:

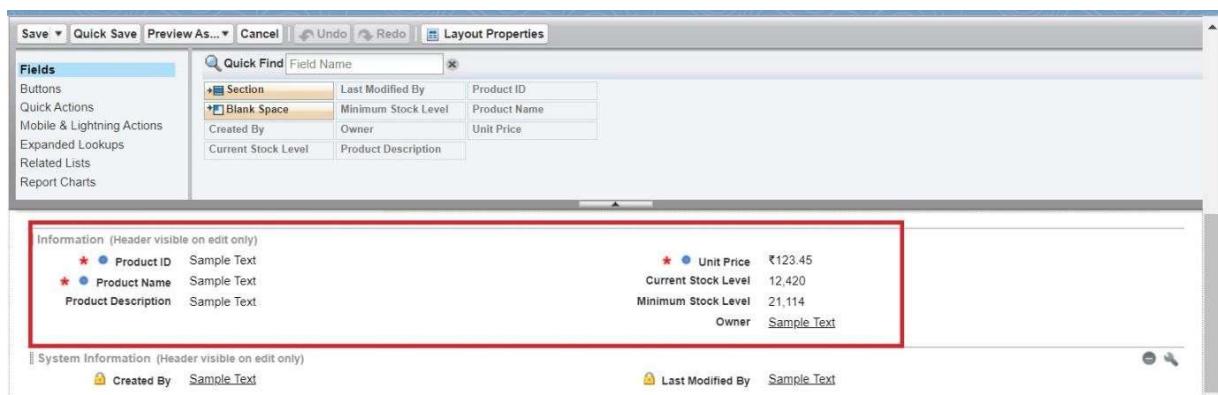
Object	Field Name	Data Type
Product	Product ID(Standard)	Text
	Product Name	Text
	Product Description	Text Area
	Minimum Stock Level	Number(18, 0)
	Current Stock Level	Number(18, 0)
	Unit Price	Currency(16, 2)
	Expiry Date	Date

Purchase Order	Purchase Order ID(Standard)	Text
	Supplier ID	Lookup(Supplier)
	Order Date	Date
	Expected Delivery Date	Date
	Actual Delivery Date	Date
	Order Count	Roll-Up Summary (COUNT Order Item)
	Total Order Cost	Currency(16, 2)
Order Item	Order Item ID(Standard)	Text
	Product ID	Lookup(Product)
	Purchase Order ID	Master-Detail(Purchase Order)
	Quantity Ordered	Number(18, 0)
	Quantity Received	Number(18, 0)
	Unit Price	Formula(Currency)
	Amount	Formula(Currency)
Inventory Transaction	Transaction ID(Standard)	Text
	Purchase Order ID	Lookup(Purchase Order)
	Transaction Date	Date
	Transaction Type	Picklist
	Total Order Cost	Formula(Currency)
Supplier	Supplier ID(Standard)	Text

	Supplier Name	Text
	Contact Person	Text
	Phone Number	Phone
	Email	Email
	Address	TextArea

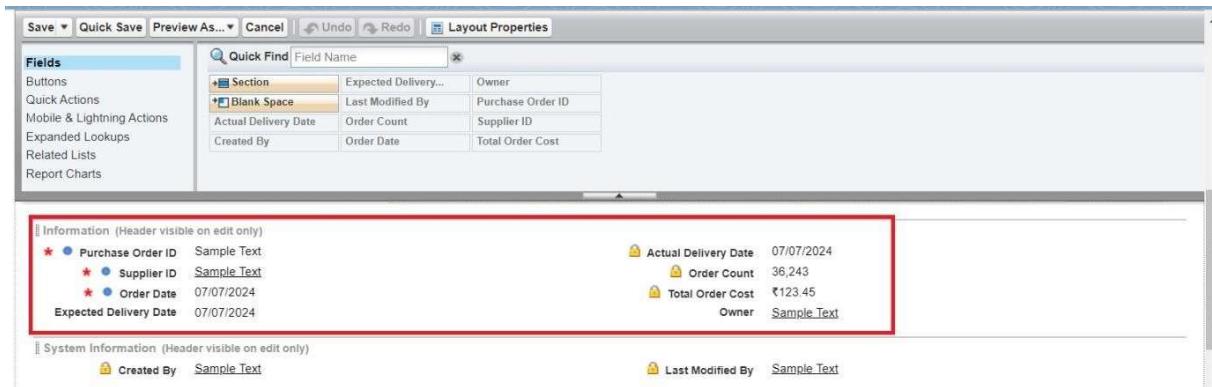
9. Edited a Page Layout in Product Object

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.

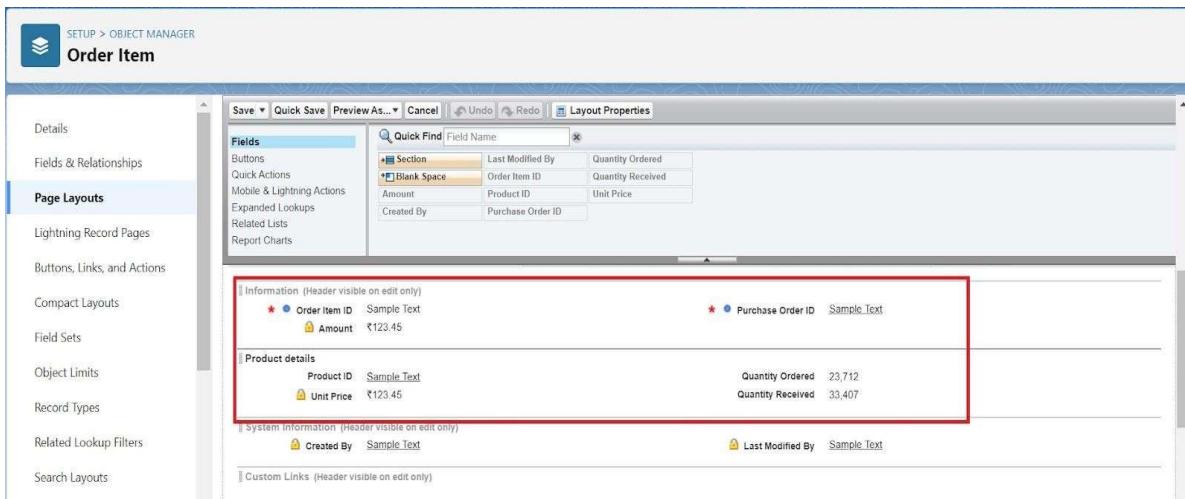


4. Click on Save.

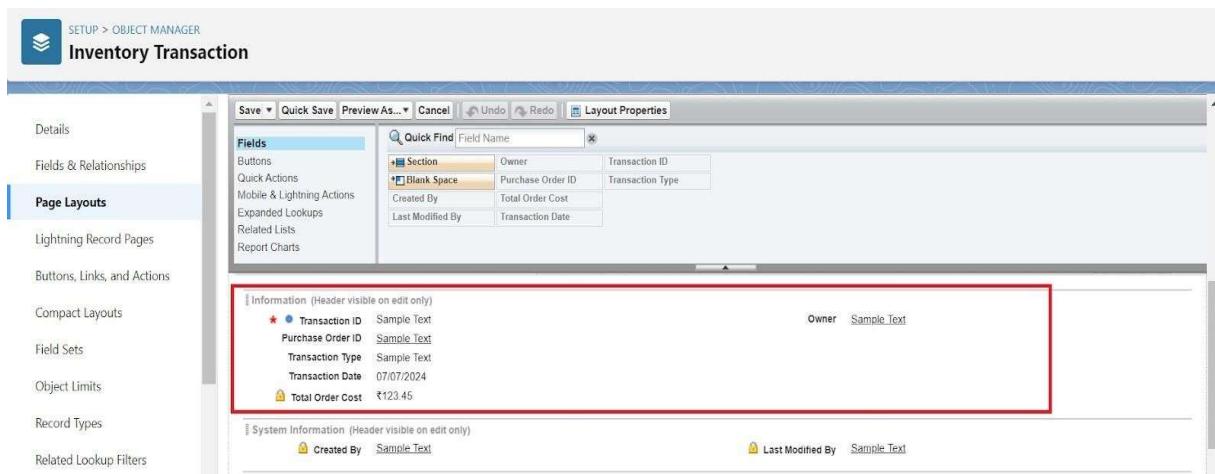
9.1 Edited a Page Layout in Purchase Order Object



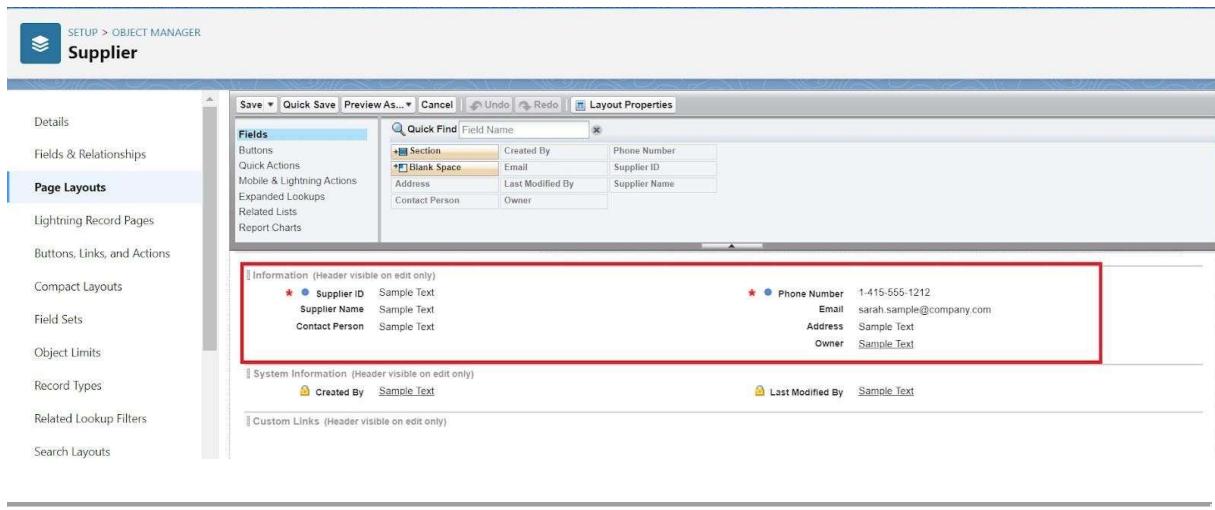
9.2 Edited a Page Layout in Order Item Object



9.3 Edited a Page Layout in Inventory Transaction Object



9.4 Edited a Page Layout in Supplier Object



10. Created 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.

SETUP > OBJECT MANAGER
Product

Compact Layouts
1 Items, Sorted by Label

LABEL	API NAME	PRIMARY	MODIFIED BY	LAST MODIFIED
System Default	SYSTEM			3

Enter Compact Layout Information

Label: 4

Name: 4

Select Compact Layout Fields

Available Fields	Selected Fields
Created By Last Modified By Minimum Stock Level Owner Product ID	Product Name Unit Price Current Stock Level

Add Remove 5

Top Up
Up
Down
Bottom

Use SHIFT + click to select adjacent fields. Use CTRL + click to select an assortment of fields.

6

Product Compact Layouts
Compact Layout Assignment

Primary Compact Layout

Select the compact layout to use when this object's records appear as list items in the mobile app.

Primary Compact Layout: 9

10

10.1 Created a Compact Layout to a Purchase Order Object

The screenshot shows the 'Compact Layout Edit' window. In the 'Enter Compact Layout Information' section, the 'Label' field is set to 'Purchase Order Compact L' (highlighted by a red box) and the 'Name' field is set to 'Purchase_Order_Compact' (highlighted by a red box). In the 'Select Compact Layout Fields' section, the 'Available Fields' list includes 'Actual Delivery Date', 'Created By', 'Expected Delivery Date', 'Last Modified By', 'Owner', and 'Order Count'. The 'Selected Fields' list contains 'Purchase Order ID', 'Order Date', 'Total Order Cost', and 'Supplier ID'. A red box highlights the 'Selected Fields' list. At the bottom, there are 'Save' and 'Cancel' buttons, with the 'Save' button highlighted by a red box.

Purchase Order Compact Layouts Compact Layout Assignment

The screenshot shows the 'Compact Layout Assignment' window. It displays the 'Primary Compact Layout' section, which asks to select the compact layout to use for list items in the mobile app. A red box highlights the 'Primary Compact Layout' dropdown menu, which is set to 'Purchase Order Compact Layout'. Below the dropdown are 'Save' and 'Cancel' buttons, with the 'Save' button highlighted by a red box.

11. Create an Expected Delivery Date Validation rule 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 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 :
$$(\text{Expected_Delivery_Date_c} - \text{Order_Date_c}) > 7$$

Purchase Order Validation Rule

Help for this Page

Define a validation rule by specifying an error condition and a corresponding error message. The error condition is written as a Boolean formula expression that returns true or false. When the formula expression returns true, the save will be aborted and the error message will be displayed. The user can correct the error and try again.

Validation Rule Edit Save Save & New Cancel

Rule Name: Expected_Delivery_Date_Validation 3

Active: 4

Description:

Error Condition Formula

Example: `Discount_Percent__c>0.30` [More Examples...](#)

Display an error if Discount is more than 30%

If this formula expression is **true**, display the text defined in the Error Message area

Insert Field Insert Operator 5

(Expected_Delivery_Date__c - Order_Date__c)> 7

Functions

-- All Function Categories --

ABS
ACOS
ADDMONTHS
AND
ASCII
ASIN

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.

Error Message

Example: Discount percent cannot exceed 30%

This message will appear when Error Condition formula is **true**

Error Message: The Expected Delivery Date should not exceed 7 days. 6

This error message can either appear at the top of the page or below a specific field on the page

Error Location: Top of Page Field 7

8 Save Save & New Cancel

12. Created an Inventory Manager Profile

The screenshot shows the Salesforce Setup interface under the Profiles section. A red box highlights the 'Profiles' tab in the left navigation bar. The main area displays a list of existing profiles: Salesforce API Only System Integrations, Silver Partner User, Solution Manager, Standard Platform User, Standard User (which is selected and highlighted with a red box), and System Administrator. The 'User License' column lists Salesforce Integration, Silver Partner, Salesforce, Salesforce Platform, Salesforce, and Salesforce respectively. A navigation bar at the top includes 'Setup', 'Home', 'Object Manager', and a search bar labeled 'Profiles'. A message at the bottom left says 'Didn't find what you're looking for? Try using Global Search.'

Clone Profile

Enter the name of the new profile.

The dialog box has a header 'You must select an existing profile to clone from.' It shows the 'Existing Profile' as 'Standard User' and 'User License' as 'Salesforce'. The 'Profile Name' field contains 'Inventory Manager' (highlighted with a red box). At the bottom are 'Save' and 'Cancel' buttons, with 'Save' highlighted by a red box.

The screenshot shows the 'Custom App Settings' page for the 'Inventory Manager' profile. A red box highlights the 'Medical Inventory Management (Medical_Inventory_Management)' app under the 'Visible' column. The page lists various apps with their visibility and default settings. Required information is indicated by a red exclamation mark icon.

App	Visible	Default
All Tabs (standard__AllTabSet)	<input checked="" type="checkbox"/>	<input type="radio"/>
Analytics Studio (standard__Insights)	<input checked="" type="checkbox"/>	<input type="radio"/>
App Launcher (standard__AppLauncher)	<input checked="" type="checkbox"/>	<input type="radio"/>
Bolt Solutions (standard__LightningBolt)	<input checked="" type="checkbox"/>	<input type="radio"/>
Community (standard__Community)	<input checked="" type="checkbox"/>	<input type="radio"/>
Content (standard__Content)	<input checked="" type="checkbox"/>	<input type="radio"/>
Data Manager (standard__DataManager)	<input checked="" type="checkbox"/>	<input type="radio"/>
Digital Experiences (standard__SalesforceCMS)	<input checked="" type="checkbox"/>	<input type="radio"/>
Lightning Usage App (standard__LightningInstrumentation)	<input checked="" type="checkbox"/>	<input type="radio"/>
Marketing CRM Classic (standard__Marketing)	<input checked="" type="checkbox"/>	<input type="radio"/>
Medical Inventory Management (Medical_Inventory_Management)	<input checked="" type="checkbox"/>	<input checked="" type="radio"/>
Queue Management (standard__QueueManagement)	<input checked="" type="checkbox"/>	<input type="radio"/>
Sales (standard__LightningSales)	<input checked="" type="checkbox"/>	<input type="radio"/>
Sales (standard__Sales)	<input checked="" type="checkbox"/>	<input type="radio"/>
Sales Console (standard__LightningSalesConsole)	<input checked="" type="checkbox"/>	<input type="radio"/>
Salesforce Chatter (standard__Chatter)	<input checked="" type="checkbox"/>	<input type="radio"/>
Salesforce Scheduler Setup (standard__LightningScheduler)	<input type="checkbox"/>	<input type="radio"/>
Sample Console (standard__ServiceConsole)	<input type="checkbox"/>	<input type="radio"/>
Service (standard__Service)	<input checked="" type="checkbox"/>	<input type="radio"/>
Service Console (standard__LightningService)	<input checked="" type="checkbox"/>	<input type="radio"/>
Site.com (standard__Sites)	<input checked="" type="checkbox"/>	<input type="radio"/>
Subscription Management (standard__RevenueCloudConsole)	<input checked="" type="checkbox"/>	<input type="radio"/>
WDC (standard__Work)	<input checked="" type="checkbox"/>	<input type="radio"/>

Custom Object Permissions						
	Basic Access			Data Administration		
	Read	Create	Edit	Delete	View All	Modify All
Inventory Transactions	<input checked="" type="checkbox"/>					
	<input checked="" type="checkbox"/>					
	<input checked="" type="checkbox"/>					
Order Items	<input checked="" type="checkbox"/>					
Products	<input checked="" type="checkbox"/>					
Purchase Orders	<input checked="" type="checkbox"/>					
	<input checked="" type="checkbox"/>					
Suppliers	<input checked="" type="checkbox"/>					

Password Policies

User passwords expire in	Never expires
Enforce password history	3 passwords remembered
Minimum password length	8
Password complexity requirement	Must include alpha and numeric characters
Password question requirement	Cannot contain password
Maximum invalid login attempts	10
Lockout effective period	15 minutes
Obscure secret answer for password resets	<input type="checkbox"/>
Require a minimum 1 day password lifetime	<input type="checkbox"/>
Don't immediately expire links in forgot password emails	<input type="checkbox"/> i

Action Buttons: Save (highlighted), Save & New, Cancel

12.1 Created an Purchase Manager Profile

SETUP Profiles

Set the permissions and page layouts for this profile.

Profile Edit	Name : Purchase Manager	Save Save & New Cancel																																																																																
User License	Salesforce	Custom Profile																																																																																
Description	<input type="text"/>																																																																																	
Custom App Settings																																																																																		
<table border="1"> <thead> <tr> <th>Visible</th> <th>Default</th> <th></th> </tr> </thead> <tbody> <tr> <td><input checked="" type="checkbox"/></td> <td><input type="radio"/></td> <td>All Tabs (standard__AllTabSet)</td> </tr> <tr> <td><input checked="" type="checkbox"/></td> <td><input type="radio"/></td> <td>Analytics Studio (standard__Insights)</td> </tr> <tr> <td><input checked="" type="checkbox"/></td> <td><input type="radio"/></td> <td>App Launcher (standard__AppLauncher)</td> </tr> <tr> <td><input checked="" type="checkbox"/></td> <td><input type="radio"/></td> <td>Bolt Solutions (standard__LightningBolt)</td> </tr> <tr> <td><input checked="" type="checkbox"/></td> <td><input type="radio"/></td> <td>Community (standard__Community)</td> </tr> <tr> <td><input checked="" type="checkbox"/></td> <td><input type="radio"/></td> <td>Content (standard__Content)</td> </tr> <tr> <td><input checked="" type="checkbox"/></td> <td><input type="radio"/></td> <td>Data Manager (standard__DataManager)</td> </tr> <tr> <td><input checked="" type="checkbox"/></td> <td><input type="radio"/></td> <td>Digital Experiences (standard__SalesforceCMS)</td> </tr> <tr> <td><input checked="" type="checkbox"/></td> <td><input type="radio"/></td> <td>Lightning Usage App (standard__LightningInstrumentation)</td> </tr> <tr> <td><input checked="" type="checkbox"/></td> <td><input type="radio"/></td> <td>Marketing CRM Classic (standard__Marketing)</td> </tr> <tr> <td><input checked="" type="checkbox"/></td> <td><input checked="" type="radio"/></td> <td>Medical Inventory Management (Medical_Inventory_Management)</td> </tr> <tr> <td><input checked="" type="checkbox"/></td> <td><input type="radio"/></td> <td>Queue Management (standard__QueueManagement)</td> </tr> <tr> <td colspan="3" style="text-align: right;"><small>Required Information</small></td> </tr> <tr> <td colspan="3"> <table border="1"> <thead> <tr> <th>Visible</th> <th>Default</th> </tr> </thead> <tbody> <tr> <td><input 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Password Policies

User passwords expire in	Never expires <input checked="" type="button"/>
Enforce password history	3 passwords remembered <input type="button"/>
Minimum password length	8 <input type="button"/>
Password complexity requirement	Must include alpha and numeric characters <input type="button"/>
Password question requirement	Cannot contain password <input type="button"/>
Maximum invalid login attempts	10 <input type="button"/>
Lockout effective period	15 minutes <input type="button"/>
Obscure secret answer for password resets	<input type="checkbox"/>
Require a minimum 1 day password lifetime	<input type="checkbox"/>
Don't immediately expire links in forgot password emails	<input type="checkbox"/> i

Save Save & New Cancel

13. Created a Purchasing Manager Role.

Setup Home Object Manager

Q. roles

Users Roles

Feature Settings

- Sales
 - Contact Roles on Contracts
 - Contact Roles on Opportunities
- Service
- Case Teams
 - Case Team Roles
 - Contact Roles on Cases

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

SETUP Roles

Understanding Roles

Set up your Role Hierarchy to control how your organization reports on and accesses data.

Sample Role Hierarchy View other sample Role Hierarchies Territory-based Sample

```

graph TD
    CEO[CEO, President] --> CFO[CFO, VP Sales]
    CFO --> ExecutiveStaff[Executive Staff]
    ExecutiveStaff --> WesternSalesDir[Western Sales Director]
    ExecutiveStaff --> EasternSalesDir[Eastern Sales Director]
    ExecutiveStaff --> InternationalSalesDir[International Sales Director]
    WesternSalesDir --> CARep[CA Sales Rep]
    WesternSalesDir --> CHRep[CH Sales Rep]
    EasternSalesDir --> NYRep[NY Sales Rep]
    EasternSalesDir --> MARep[MA Sales Rep]
    InternationalSalesDir --> ASRep[Asian Sales Rep]
    InternationalSalesDir --> ESRep[European Sales Rep]
  
```

Set Up Roles Don't show this page again

SETUP



Roles

Role Edit
New Role

Role Edit

Label	Purchasing Manager
Role Name	Purchasing_Manager
This role reports to	SVP, Sales & Marketing

Role Name as displayed on reports

Save **Save & New** **Cancel**

13.1 Created a Inventory Manager Role.

Setup Home Object Manager

roles

- Users
- Roles**
- Feature Settings
- Sales
 - Contact Roles on Contracts
 - Contact Roles on Opportunities
- Service
- Case Teams
 - Case Team Roles
 - Contact Roles on Cases

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

Understanding Roles

Set up your Role Hierarchy to control how your organization reports on and accesses data.

Sample Role Hierarchy
View other sample Role Hierarchies **Territory-based Sample**

Executive Staff
CEO_President, CFO_VP_Sales, International Sales Director

Western Sales Director, Eastern Sales Director, International Sales Director

CA Sales Rep, OR Sales Rep, NY Sales Rep, MA Sales Rep, Asian Sales Rep, European Sales Rep

Set Up Roles Don't show this page again

Role Edit
New Role

Role Edit

Label	Inventory Manager
Role Name	Inventory_Manager
This role reports to	SVP, Sales & Marketing
Role Name as displayed on reports	

Save **Save & New** **Cancel**

14. Created a Permission Set.

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

Setup Home Object Manager

Q. Permission

Permission Set Groups

Permission Sets

Custom Code

Custom Permissions

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

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 Label	Description	License
<input type="checkbox"/>	Buyer	Allows access to the store. Lets users see products and categories, make...	B2B Buyer Permission Set One Seat
<input type="checkbox"/>	Buyer Manager	Includes all Buyer capabilities, and allows access to manage carts and or...	B2B Buyer Manager Permission Set One Seat
<input type="checkbox"/>	C360 High Scale Flow Integration User	Allows integration user to access features specific to C360 High Scale Flow...	Cloud Integration User
<input type="checkbox"/>	CRM User	Denotes that the user is a Sales Cloud or Service Cloud user.	CRM User
<input type="checkbox"/>	Commerce Admin	Allow access to commerce admin features.	Commerce Admin Permission Set License Seat
<input type="checkbox"/>	Contact Center Admin	Manage Service Cloud Voice contact centers that use Amazon Connect a...	Service Cloud Voice User
<input type="checkbox"/>	Contact Center Admin (Partner Telephony)	Manage Service Cloud Voice contact centers that use your preferred tele...	Service Cloud Voice User (Partner Telephony)
<input type="checkbox"/>	Contact Center Agent	Access agent features in Service Cloud Voice contact centers that use A...	Service Cloud Voice User
<input type="checkbox"/>	Contact Center Agent (Partner Telephony)	Access agent features in Service Cloud Voice contact centers that use yo...	Service Cloud Voice User (Partner Telephony)
<input type="checkbox"/>	Contact Center Supervisor	Access supervisor features in Service Cloud Voice contact centers that us...	Service Cloud Voice User
<input type="checkbox"/>	Contact Center Supervisor (Partner Telephony)	Access supervisor features in Service Cloud Voice contact centers that us...	Service Cloud Voice User (Partner Telephony)
<input type="checkbox"/>	Data Cloud Home Org Integration User	Allows integration user to access entities specific to Remote Data Cloud.	Cloud Integration User
<input type="checkbox"/>	DeliveryEstimationServicePermSet	Allows integration user to access entities specific to Remote Data Cloud.	Cloud Integration User
<input type="checkbox"/>	Experience Profile Manager		Salesforce

1-25 of 45 0 Selected

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

Permission Set Create

Enter permission set information

Label	Purchase Manager Create Access
API Name	Purchase_Manager
Description	
Session Activation Required	<input type="checkbox"/>

Save Cancel

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

Permission Set Purchase Manager Create Access

Find Settings... | Clone | Delete | Edit Properties | Manage Assignments | View Summary

Permission Set Overview > Object Settings Order Items

Order Items

Tab Settings

Available	Visible
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Object Permissions

Permission Name	Enabled
Read	<input checked="" type="checkbox"/>
Create	<input checked="" type="checkbox"/>
Edit	<input type="checkbox"/>
Delete	<input type="checkbox"/>
View All	<input type="checkbox"/>
Modify All	<input type="checkbox"/>

Save Cancel

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

... > PERMISSION SET 'PURCHASE MANAGER CREATE ACCESS' > MANAGE ASSIGNMENT EXPIRATION

Purchase Manager Create Access

Select Users to Assign

Active Users

Full Name	Alias	Username	Role	Active	Profile
Annapurna Gurram	AGurr	medicalinventory@sb.com		<input checked="" type="checkbox"/>	System Administrator
Chatter Expert	Chatter	chatty.00dd0000058bqluaayrgohck7wjvo@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
Integration User	integ	integration@00dd0000058bqlua.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
John PurchaseM	jpurc	john@purchasem.com	Purchasing Manager	<input checked="" type="checkbox"/>	Purchase Manager
Security User	sec	insightssecurity@00dd0000058bqlua.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User

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

... > PERMISSION SET 'PURCHASE MANAGER CREATE ACCESS' > MANAGE ASSIGNMENT EXPIRATION

Purchase Manager Create Access

Select an Expiration Option For Assigned Users

No expiration date (i)

Specify the expiration date

1 Day | 1 Week | 30 Days | 60 Days | Custom Date

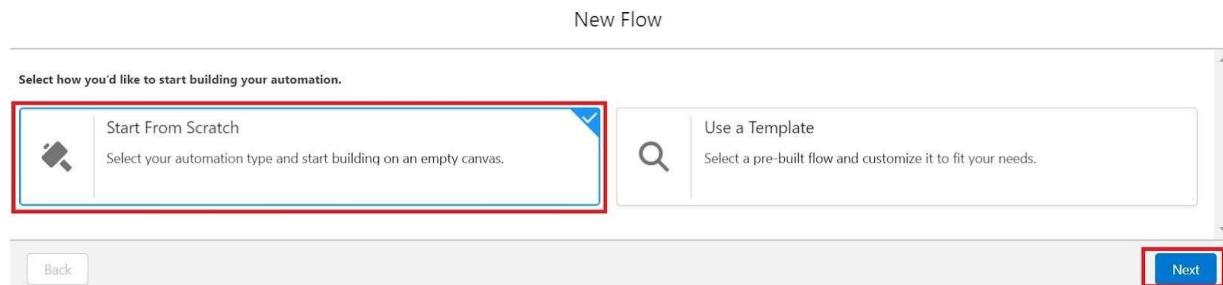
Time Zone
Select a time zone...

Selected Users

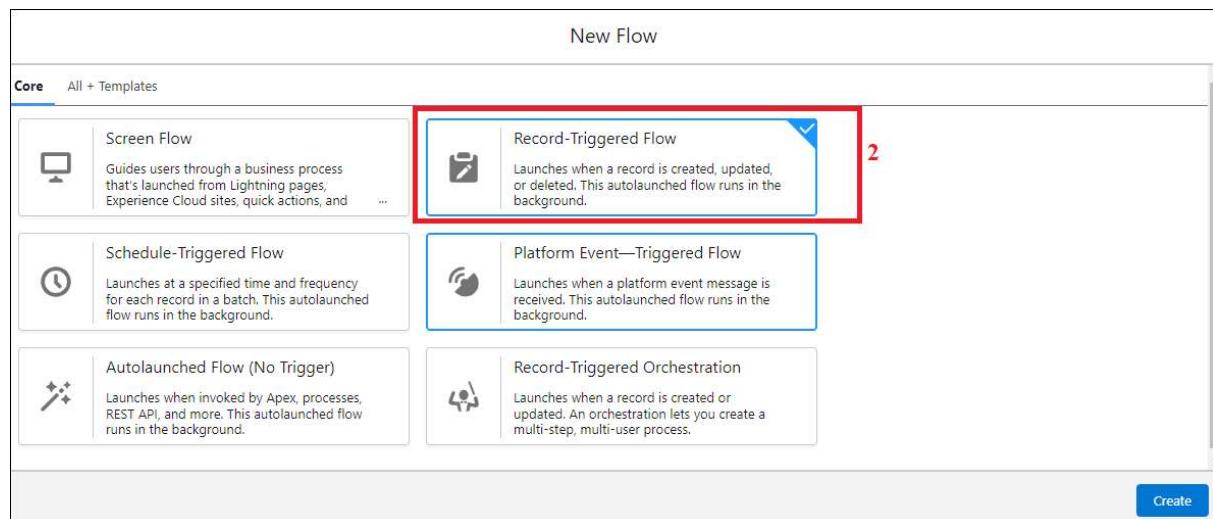
Full Name	Role	Profile	Active	User License	Expires On
John PurchaseM	Purchasing Manager	Purchase Manager	<input checked="" type="checkbox"/>	Salesforce	Never Expires

15. Created Flow to update the Actual Delivery Date.

1. Go to setup >> type Flow in quick find box >> Click on the Flow and Select the New Flow >> Start From Scratch .

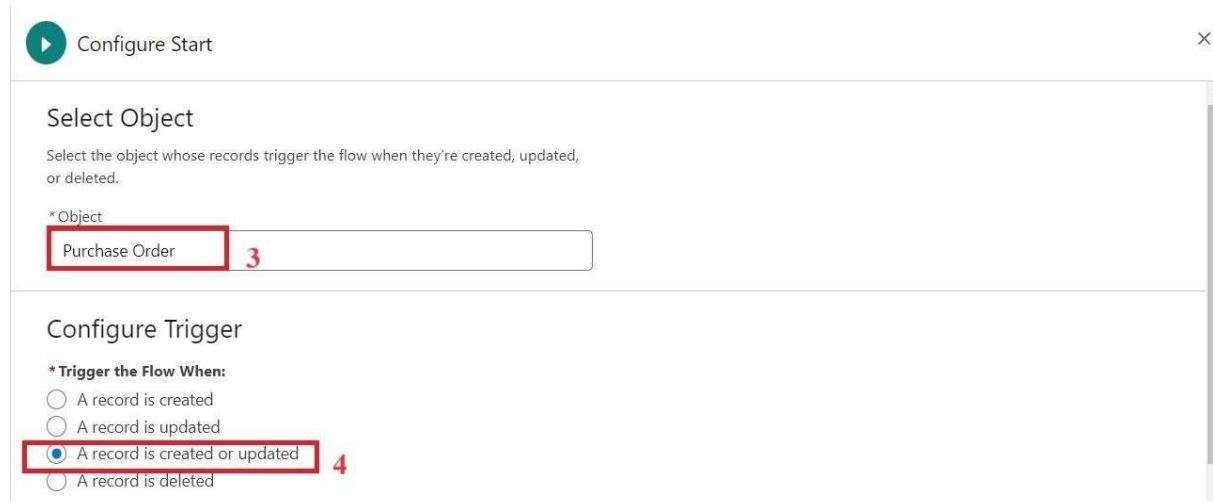


2. Select the record Triggered flow.Click on create.



3. Under Object select “Purchase Order”

4. Select A record is created or updated



5. Set Entry Conditions : None

6. Select Fast Field Updates and click on Done

Set Entry Conditions

Specify entry conditions to reduce the number of records that trigger the flow and the number of times the flow is executed. Minimizing unnecessary flow executions helps to conserve your org's resources.

If you create a flow that's triggered when a record is updated, we recommend first defining entry conditions. Then select the **Only when a record is updated to meet the condition requirements** option for When to Run the Flow for Updated Records.

Condition Requirements
None

* Optimize the Flow for:

Fast Field Updates
Update fields on the record that triggers the flow to run. This high-performance flow runs *before* the record is saved to the database.

Actions and Related Records
Update any record and perform actions, like send an email. This more flexible flow runs *after* the record is saved to the database.

Include a Run Asynchronously path to access an external system after the original transaction for the triggering record is successfully committed

7. Under the record trigger flow click on the “+” icon and select Get Records.

8. Enter Label as “ Get Purchase Record ”.

9. For Object select Purchase Order.

10. For Condition Requirements , select All Conditions are Met(AND)

For the first condition select as follows:

Field: Id

Operator: Equals

Value: {!\$Record.Id}

*Label
Get Purchase Record

*API Name
Get_Purchase_Record

Description

Get Records of This Object

*Object
Purchase Order

Filter Purchase Order Records

Condition Requirements
All Conditions Are Met (AND)

Field Operator Value
Id Equals $\$Record > \text{Record ID}$

+ Add Condition

11. For How many Records to store Select Only the First Record.
12. For How to Store Record Data select Choose fields and let Salesforce do the rest. Select Field: Order_Date__c. Click on Done.

How Many Records to Store

Only the first record

All records

How to Store Record Data

Automatically store all fields

Choose fields and let Salesforce do the rest

Choose fields and assign variables (advanced)

Select Purchase Order Fields to Store in Variable

Field
ID

Field
Order_Date__c

+ Add Field

13. In the Flow Builder, click on the Manager tab on the left-hand side >> Click on New Resource >> In the Resource Type dropdown, select Variable.
14. Enter API name as ActualDeliveryDate >> Select Data type as Date >> Click on Done.
15. From the Toolbox drag and drop Assignment element.
16. Enter the label as “Assignment”.

17. Set Variable Values:

a) Variable : {!ActualDeliveryDate}

Operator : Equals

Value : {!\$Record.Order_Date__c}

b) Variable : {!ActualDeliveryDate}

Operator : Add

Value : 3

* Label **Assignment**

* API Name **Assignment_1**

Description

Set Variable Values

Each variable is modified by the operator and value combination.

Variable	Operator	Value
ActualDeliveryDate	Equals	\$Record > Order Date
ActualDeliveryDate	Add	3

+ Add Assignment

18. Click Done

19. From the Toolbox drag and drop Update Records element and connect to the Assignment element.

20. Enter the label as “Updating Purchasing Order”.

21. How to Find Records to Update and Set Their Values : Use the Purchase Order record that triggered the flow

22. Set Filter Conditions : None -Always Update Record

23. Set Field Values for the Trip Record as

Field : Actual_Delivery_Date__c

Value : {!ActualDeliveryDate}

Update Records

*** How to Find Records to Update and Set Their Values**

- Use the purchase order record that triggered the flow
- Update records related to the purchase order record that triggered the flow
- Use the IDs and all field values from a record or record collection
- Specify conditions to identify records, and set fields individually

Info Because this flow runs *before* a record is saved, you can only update the record that triggered the flow to run. To update other records, configure the trigger to run the flow *after* the record is saved.

Set Filter Conditions

Condition Requirements to Update Record

None—Always Update Record

Set Field Values for the Purchase Order Record

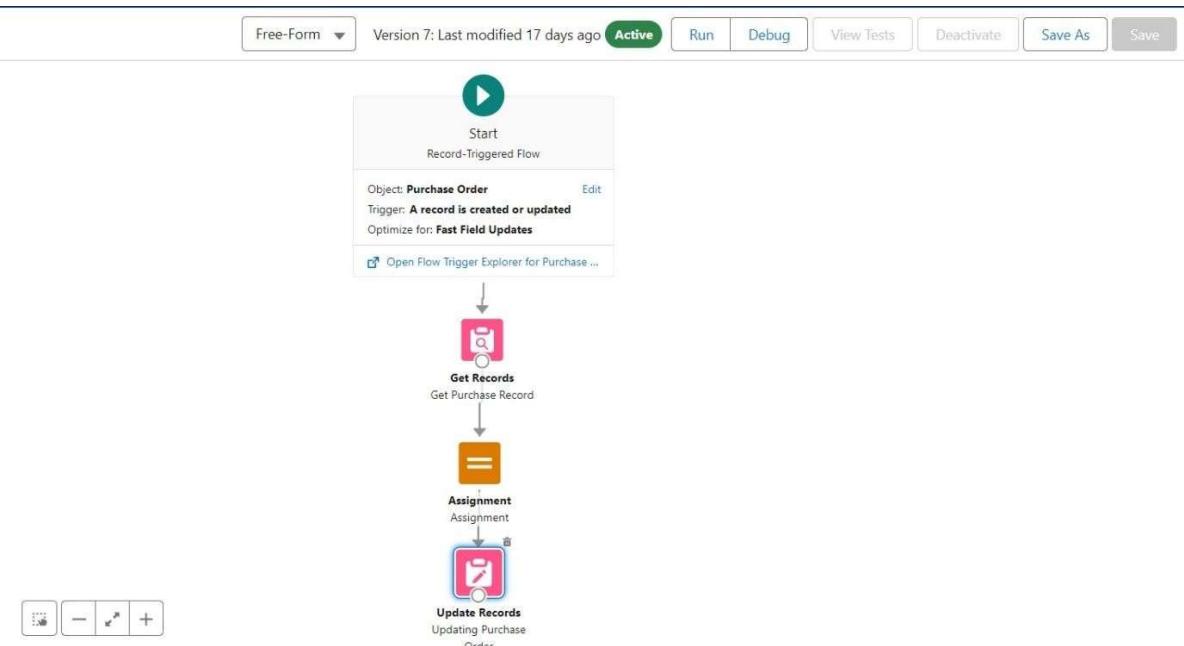
Field	Value
Actual_Delivery_Date__c	ActualDeliveryDate

+ Add Field

24. Click Done

25. Save the flow as “Actual Delivery Date Updating”.

26. Activate the flow.



16. Created 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.

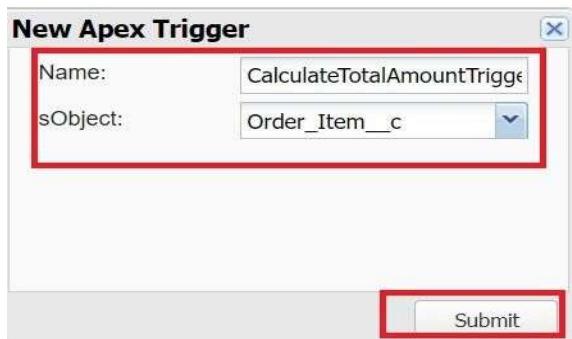
ii) Click on Developer Console: Click on the "Developer Console" option from the Setup menu. This will open the Developer Console in a new browser tab or window.

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.



Create an Apex Trigger:

```
trigger CalculateTotalAmountTrigger on Order_Item__c (after insert, after update, after delete, after undelete) {
```

```

// Call the handler class to handle the logic
CalculateTotalAmountHandler.calculateTotal(Trigger.new, Trigger.old,
Trigger.isInsert, Trigger.isUpdate, Trigger.isDelete, Trigger.isUndelete);
}

```

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

```

public class CalculateTotalAmountHandler {

    // Method to calculate the total amount for Purchase Orders based on related
    Order Items

    public static void calculateTotal(List<Order_Item__c> newItems,
List<Order_Item__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_Id__c);
            }
        }
    }
}

```

```
}
```

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

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

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

```
        parentIds.add(ordItem.Purchase_Order_Id__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_Id__c, SUM(Amount__c) totalAmount
```

```
        FROM Order_Item__c
```

```
        WHERE Purchase_Order_Id__c IN :parentIds
```

```
        GROUP BY Purchase_Order_Id__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;
}
}

}
}

```

Save all.

17. Created 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.

Create Report

The screenshot shows the 'Create Report' interface. On the left, there's a sidebar with categories like 'Recently Used', 'All', 'Accounts & Contacts', 'Opportunities', 'Customer Support Reports', 'Leads', 'Campaigns', 'Activities', and 'Contracts and Orders'. The 'All' category is selected. In the center, a search bar says 'Select a Report Type' with 'Purchase' typed in. Below it, a list of 'Report Type Name' and 'Category' is shown, with 'Purchase Orders' selected. To the right, a 'Details' panel for 'Purchase Orders' is open, showing a summary, a 'Start Report' button (which is highlighted with a red box), and sections for 'Created By You' and 'Created By Others'.

6. Click on Filters and select as follows and click on Apply

The screenshot shows the 'Filters' section. It has tabs for 'Outline' and 'Filters', with 'Filters' selected. A search bar says 'Add filter...' with a magnifying glass icon. Below it, a 'Show Me' section is expanded, showing 'All purchase orders'. Another section below it, 'Actual Delivery Date', is also expanded, showing 'All Time'. Both of these sections are highlighted with a red box.

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”)

REPORT ▾ Purchase Orders based on Suppliers ▾ Purchase Orders

Fields

Groups

- GROUP ROWS
 - Add group...
- Supplier ID
- Purchase Order: Purchase Order ID

Columns

- Add column...
- # Order Count
- # Total Order Cost

Supplier ID ↑ Purchase Order: Purchase Order ID ↑ Order Count ↑ Total Order Cost

Supplier ID	Purchase Order: Purchase Order ID	Order Count	Total Order Cost
Supplier-001 (4)	Purchase-0001 (1) Purchase-0002 (1) Purchase-0003 (1) Purchase-0004 (1)	3 2 3 4	₹2,075.00 ₹3,250.00 ₹7,000.00 ₹9,500.00
Supplier-002 (1)	Purchase-0005 (1)	2	₹4,500.00
	Total (5)	14	₹26,325.00

Row Counts Detail Rows Subtotals Grand Total

Conditional Formatting

Update Preview Automatically

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.

Report: Purchase Orders
Purchase Orders based on Suppliers

Total Records: 5 Total Order Count: 14 Total Total Order Cost: ₹26,325.00

Supplier ID	Purchase Order: Purchase Order ID	Order Count	Total Order Cost
Supplier-001 (4)	Purchase-0001 (1) Purchase-0002 (1) Purchase-0003 (1) Purchase-0004 (1)	3 2 3 4	₹2,075.00 ₹3,250.00 ₹7,000.00 ₹9,500.00
Supplier-002 (1)	Purchase-0005 (1)	2	₹4,500.00
	Total (5)	14	₹26,325.00

Row Counts Detail Rows Subtotals Grand Total

17.1 Created 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

The screenshot shows the 'Filters' section of a reporting tool. At the top, there are tabs for 'Outline' and 'Filters'. Below the tabs, there is a search bar with the placeholder 'Add filter...'. Under the search bar, there is a section titled 'Show Me' containing the option 'All purchase orders', which is highlighted with a red border. Below this, there is another section titled 'Actual Delivery Date' containing the option 'All Time', also highlighted with a red border.

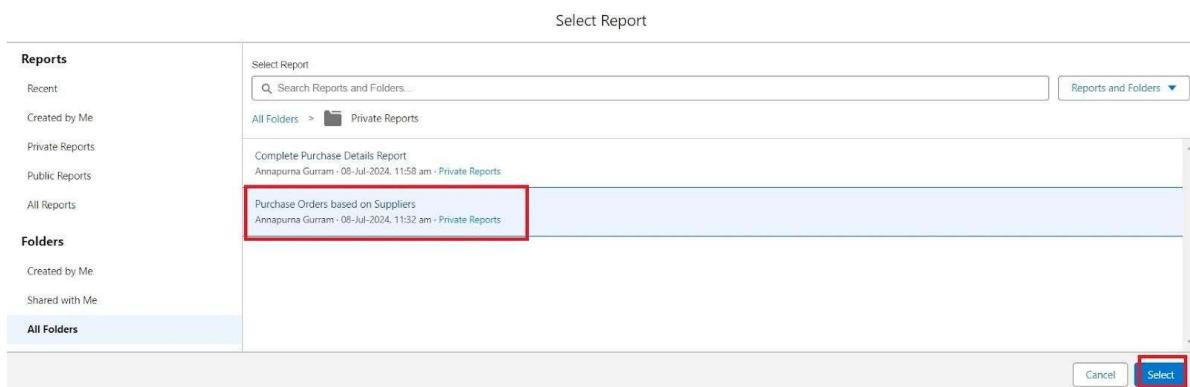
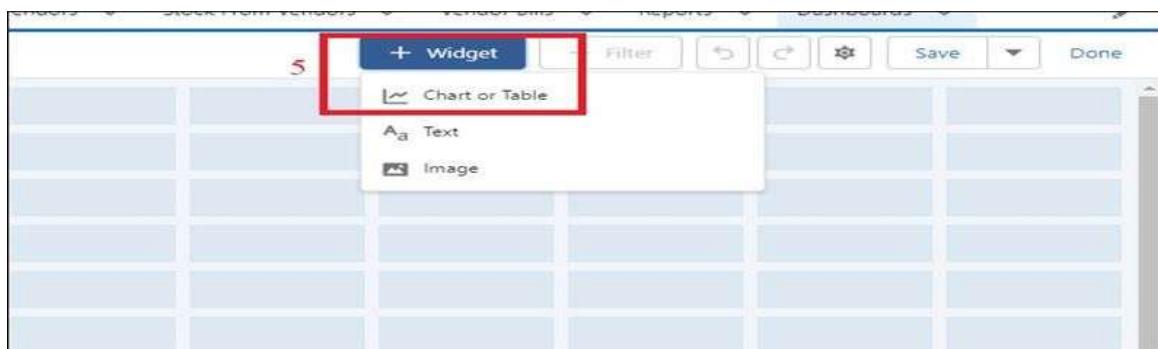
7. Customize your report, in group rows select – Supplier ID, Actual Delivery Date, Purchase Order: Purchase Order ID, for columns Product ID : Product ID, Product ID : Product Name, Order Count, Quantity Received, Amount (In this way we are making a Summary Report).

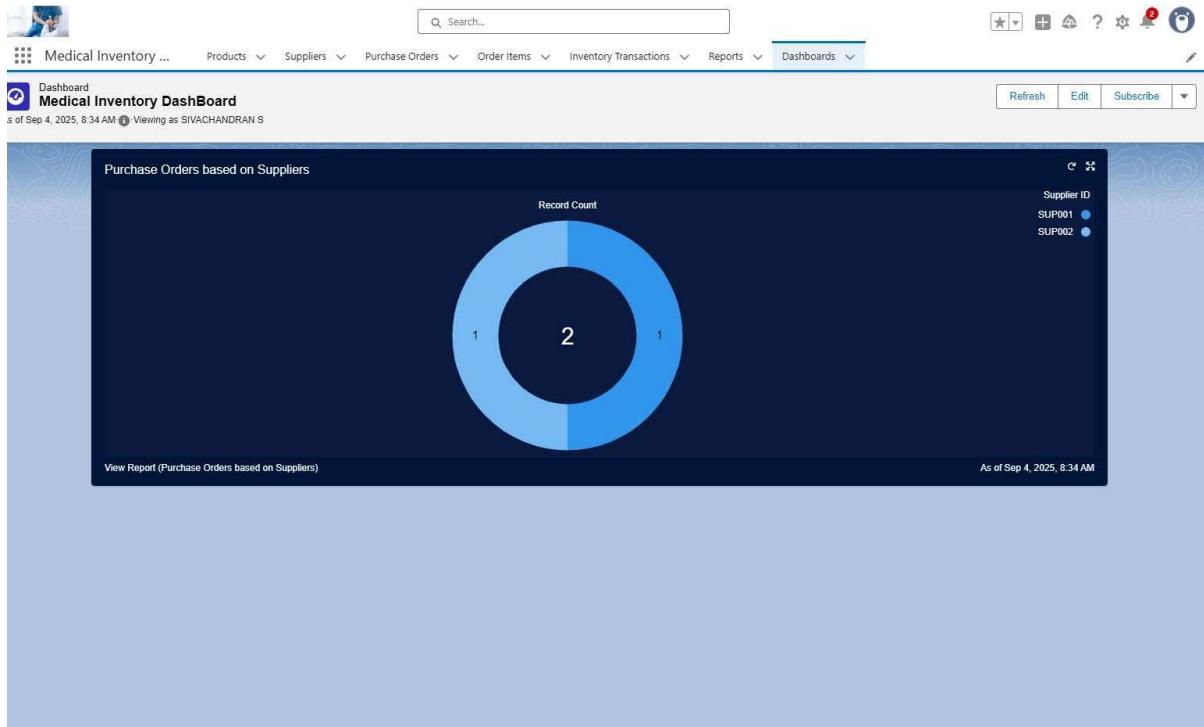
8. Click save and run
9. Give report name – Complete Purchase Details Report
10. Click Save

The screenshot shows the 'Purchase Orders with Order Items and Product ID' report preview. The interface includes a top navigation bar with 'Products', 'Purchase Orders', 'Order Items', 'Inventory Transactions', 'Suppliers', 'Reports', and 'Dashboards'. Below the navigation is a toolbar with 'Save & Run', 'Save', 'Close', and 'Run' buttons. On the left, there's a 'Fields' sidebar with 'Groups' and 'Columns' sections, both of which have several filters applied, indicated by red boxes. The main area displays a grid of data with columns: Supplier ID, Actual Delivery Date, Purchase Order: Purchase Order ID, Product ID: Product ID, Order Count, Product ID: Product Name, Quantity Received, and Amount. The data is grouped by Supplier ID and Actual Delivery Date, with subtotals shown for each group. At the bottom of the preview, there are checkboxes for 'Row Counts', 'Detail Rows', 'Subtotals', and 'Grand Total', all of which are checked.

18. Created 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.





19. Testing Approach

To ensure the app works as intended:

- **Step 1:** Created sample suppliers, products, purchase orders, and transactions.
- **Step 2:** Verified validations by entering incorrect data.
- **Step 3:** Checked automation by adding inbound transactions to see if stock updated correctly.
- **Step 4:** Reviewed reports and dashboards to ensure accurate totals.

The screenshot displays five separate windows, each showing a 'Recently Viewed' list in a Microsoft Dynamics 365 interface. The windows are arranged vertically, each with its own header bar and navigation menu.

- Products:** Shows 4 items updated a few seconds ago. The list includes Product ID P004, P003, P002, and P001.
- Suppliers:** Shows 2 items updated a few seconds ago. The list includes Supplier ID SUP002 and SUP001.
- Purchase Orders:** Shows 2 items updated a few seconds ago. The list includes Purchase Order ID PO02 and PO01.
- Order Items:** Shows 2 items updated a few seconds ago. The list includes Order Item ID OI002 and OI001.
- Inventory Transactions:** Shows 2 items updated a few seconds ago. The list includes Inventory Transaction ID T002 and T001.

Each window has a standard ribbon-style navigation bar at the top, a search bar, and a toolbar with various icons for actions like New, Import, Change Owner, and Assign Label.

20. Conclusion

The **Medical Inventory Management System** successfully demonstrates how Salesforce can be used to manage medical products, suppliers, and stock efficiently.

By using custom objects, validation rules, flows, reports, and dashboards, the application provides a complete solution for inventory management with real-time tracking and analytics.