

Title: Medical Inventory Management Using Salesforce

Using Salesforce...

Project Overview:

Medical Inventory Management ensures efficient tracking of medicines, suppliers, purchase orders, and sales orders. Using Salesforce CRM, this project automates the from procurement to entire process distribution – helping hospitals and pharmacies reduce wastage, prevent stock outs, and improve patient care.

Objectives:

- Ensure Medicine Availability: Prevent stock outs by providing real-time updates on available medicines and supplies.
- Track Expiry and Wastage: Maintain accurate records of expiry dates to minimize wastage of unused medicines.
- Improve Supplier Coordination: Automate purchase order creation, supplier communication, and delivery tracking.
- Enhance Transparency: Keep detailed logs of stock movement, purchases, and distribution for accountability.
- Optimize Resource Allocation: Monitor inventory levels, forecast demand, and automate replenishment to reduce overstocking.
- Improve Decision Making: Generate analytical reports and dashboards for administrators to plan and allocate resources effectively.
- Promote Patient Care: Build a reliable and efficient inventory system that ensures timely delivery of essential medicines to patients.

Student Outcomes:

- Practical Salesforce Experience: Students gain real-world skills in configuring objects like Suppliers, Purchase Orders, Order Items, and Products.
- Understanding of Healthcare Processes: Learn how inventory management applies to the medical field, bridging technology with healthcare needs.
- Workflow and Automation Skills: Hands-on practice with Flows, Approval Processes, Validation Rules, and Triggers.
- Reporting and Analytics: Ability to design reports and dashboards for monitoring stock, supplier performance, and order details.
- Team Collaboration: Students practice working as a team — handling requirement gathering, development, testing, and deployment.

- Problem-Solving Skills: Learn to identify challenges like shortage, expiry, duplicate orders and design Salesforce-based solutions.
- Industry-Relevant Exposure: Prepares students for careers in healthcare IT and CRM-based project implementation.

System Requirements:

Hardware Requirements:

- Computer with minimum 4 GB RAM, Dual-Core Processor
- Stable Internet Connection

Software Requirements:

- Salesforce Developer Edition Org
- Modern Web Browser (Google Chrome, Firefox, Edge)

Project Duration : 31 Hours;

Phases Overview :

Phase

No.

Phase Name Description Page

Numbers

1 Requirement

Analysis & Planning

Gathering requirements from

Donors, volunteers, and receivers;

Defining scope and goals; planning

Data model and workflows.

2 Salesforce

Development –

Backend &

Configurations

Creating custom objects, fields,

Relationships; setting up Flows

And Apex Triggers for

Automation.

4 – 11

3 UI/UX Development

& Customization

Building Lightning App,

Customizing layouts, adding fields,

Implementing Flows, and

Developing UI logic.

11 – 28

4 Data Migration,

Testing & Security

Creating Users, Profiles, Public

Groups, Sharing Rules;

Configuring Report Types, Reports, Dashboards; testing functionalities and ensuring data

Security.

28 – 37

5 Deployment,

Documentation &

Maintenance

Designing and finalizing Home

Page, deploying solution to live

Environment, preparing

Documentation, conclusion, and

Ongoing system maintenance.

37 – 40

Phase 1: Requirement Analysis & Planning:-

Medical Inventory Management:

Utilizing Salesforce, our project focuses on managing medicines, suppliers, purchase orders, and sales orders within hospitals, clinics, and pharmacies. The system streamlines stock tracking, supplier coordination, and distribution of medicines, ensuring efficiency, transparency, and minimal wastage.

Phase 2: Salesforce Development – Backend & Configurations:-

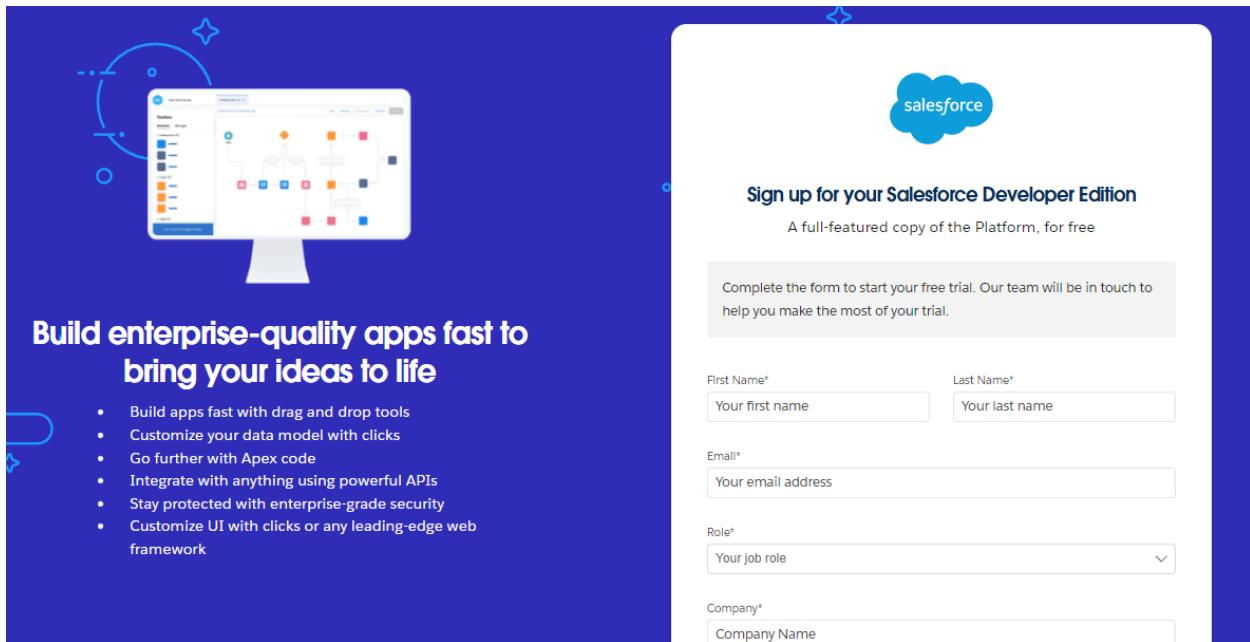
Milestone 1-Salesforce Account

Activity 1: Creating Developer Account

Creating a developer org in salesforce.

1.Go to <https://developer.salesforce.com/signup>

2.On the sign up form, enter the following details :



The image shows a screenshot of the Salesforce Developer Edition sign-up page. The page has a white header with the Salesforce logo and the text "Sign up for your Salesforce Developer Edition" and "A full-featured copy of the Platform, for free". Below the header is a call-to-action button with the text "Complete the form to start your free trial. Our team will be in touch to help you make the most of your trial." The main form area contains fields for "First Name*", "Last Name*", "Email*", "Role*", and "Company*". To the left of the form, there is a large blue sidebar with the heading "Build enterprise-quality apps fast to bring your ideas to life" and a bulleted list of features: "Build apps fast with drag and drop tools", "Customize your data model with clicks", "Go further with Apex code", "Integrate with anything using powerful APIs", "Stay protected with enterprise-grade security", and "Customize UI with clicks or any leading-edge web framework". The background of the entire page is dark blue.

1.First name & Last name

2.Email

3.Role : Developer

4.Company : College Name

5.County : India

6.Postal Code : pin code

7.Username : should be a combination of your name and company

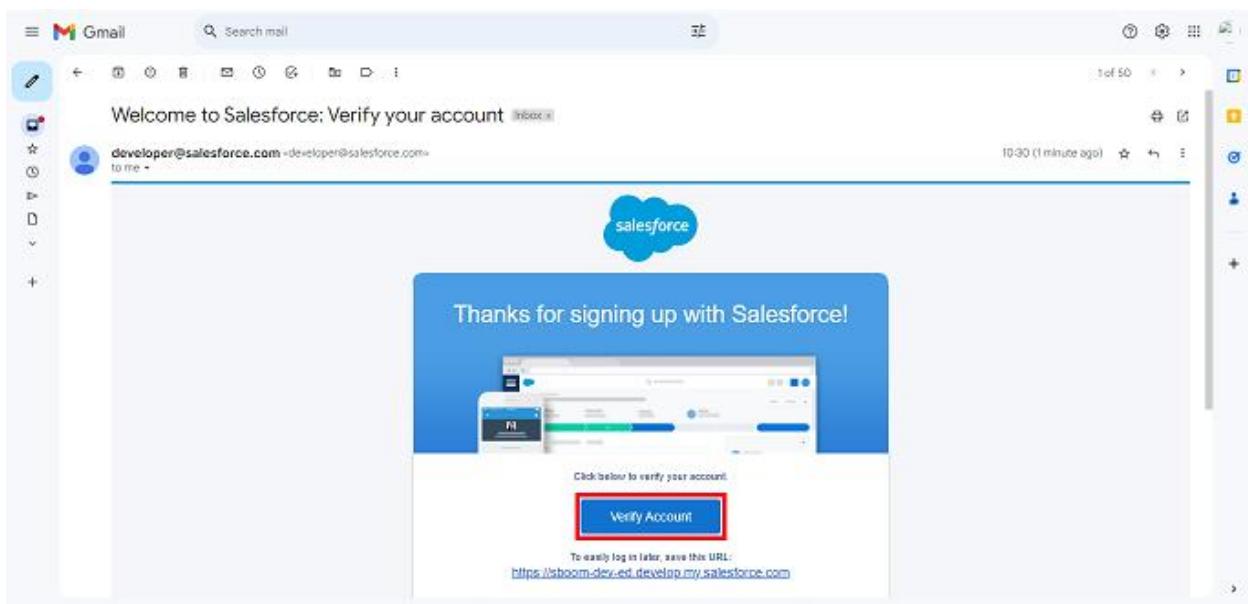
This need not be an actual email id, you can give anything in the format :

username@organization.com

Click on sign me up after filling these.

Activity 2: 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
 asdfghjkl!

Change Password

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

The screenshot shows the Salesforce Setup Home page. The left sidebar contains links like Quick Find, Setup Home, Service Setup Assistant, Multi-Factor Authentication Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, and Administration. The main content area features a "Home" section with three cards: "Get Started with Einstein Bots", "Mobile Publisher", and "Real-time Collaborative Docs". Each card has a "Get Started" button.

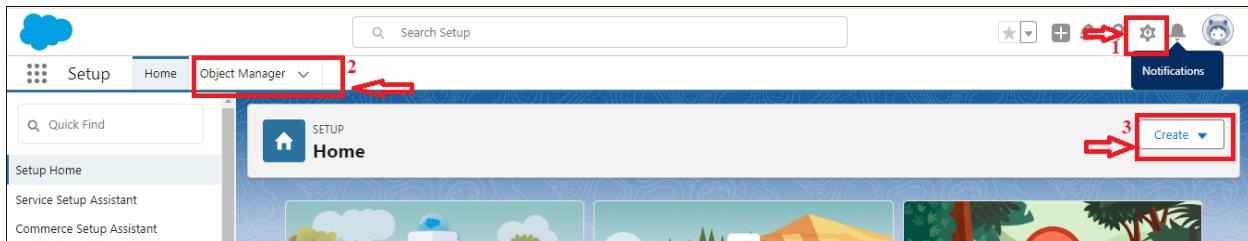
Milestone 2- Objects

In Salesforce, objects are database tables that allow you to store data specific to your organization.

Activity 1: Creating a Product Object

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.



Setup | Home | Object Manager

New Custom Object

Custom Object Definition Edit

Custom Object Information

The singular and plural labels are used in tabs, page layouts, and reports.

Label: Product **Example:** Account
Plural Label: Products **Example:** Accounts
 Starts with vowel sound

The Object Name is used when referencing the object via the API.

Object Name: Product **Example:** Account

Description:

Context-Sensitive Help Setting:

- Open the standard Salesforce.com Help & Training window
- Open a window using a Visualforce page

Enter Record Name Label and Format

The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.

Record Name: Product ID **Example:** Account Name
Data Type: Text **Warning:** If you plan to insert a high volume of records in this object, via the API for example, use the Text data type.

Optional Features

Allow Reports
 Allow Activities
 Track Field History
 Allow in Chatter Groups
 Enable Licensing

Deployment Status

Deployed

Search Status

When this setting is enabled, your users can find records of this object type when they search. [Learn more](#).

Allow Search

Object Creation Options (Available only when custom object is first created)

Add Notes and Attachments related list to default page layout
 Launch New Custom Tab Wizard after saving this custom object

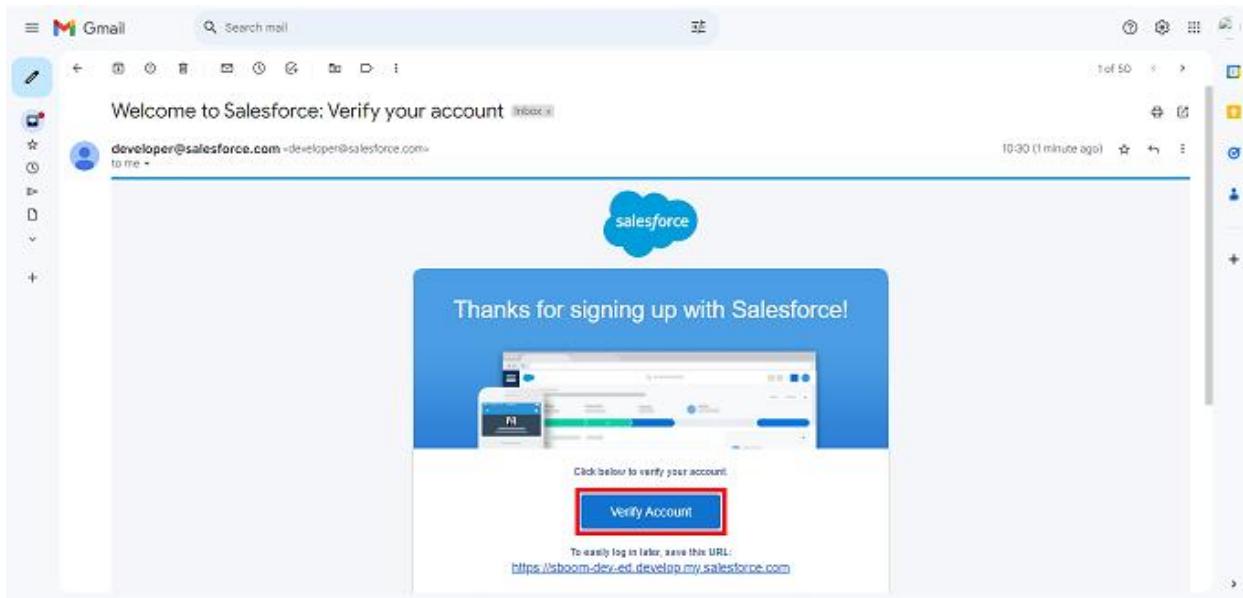
Activate Windows
[Go to Settings to activate Windows.](#)

Buttons: Save | **Save & New** | Cancel

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

Activity 2: 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

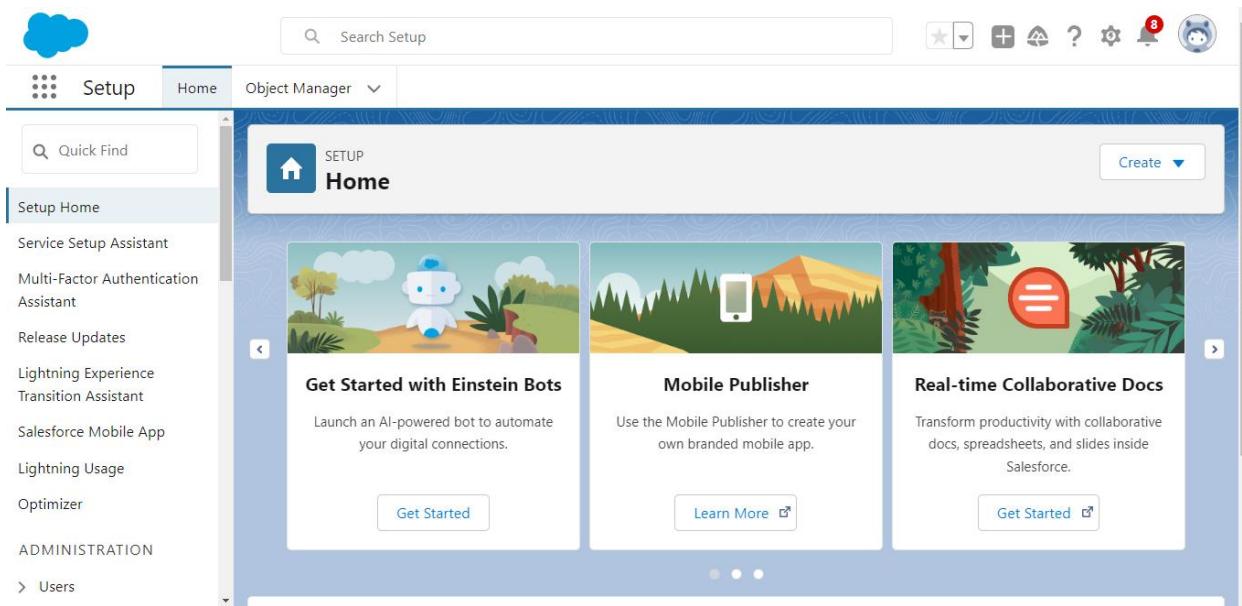
In what city were you born?

* Answer

asdfghjkl

Change Password

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



Milestone 3- Tabs

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.

Activity 1: Creating A Tab For Product Object

- 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

Activity 2: Creating Remaining Tabs

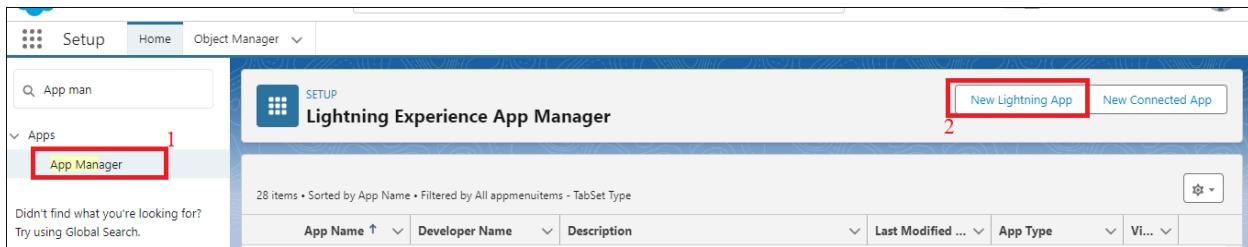
1. Now create the Tabs for the remaining Objects, they are “Purchase Order, Order Item, Inventory Transaction, Supplier”.
2. Follow the same steps as mentioned in Activity -1 .

Milestone 4- The Lightning App

A Lightning App in Salesforce is a collection of items that work together to serve a particular function for the end-users. These items can include standard and custom objects, tabs, utilities, and other productivity tools. Lightning Apps are designed to provide a more intuitive and efficient user experience compared to traditional Salesforce apps.

Activity 1: Create A Lightning App For Medical Inventory Management

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



New Lightning App

App Details

3 * App Name 3
Medical Inventory Management

* Developer Name 3
Medical.Inventory_Management

Description 3
Enter a description...

App Branding

Image 3


Primary Color Hex
Value 3
#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.

Available Items

 Dash	<input style="border: none; border-radius: 50%; width: 15px; height: 15px;" type="button" value="X"/>
 Dashboards	<input style="border: none; border-radius: 50%; width: 15px; height: 15px;" type="button" value="X"/>

Selected Items

 Products	<input style="border: none; border-radius: 50%; width: 15px; height: 15px; margin-right: 5px;" type="button" value="▲"/> <input style="border: none; border-radius: 50%; width: 15px; height: 15px;" type="button" value="▼"/>
 Purchase Orders	<input style="border: none; border-radius: 50%; width: 15px; height: 15px; margin-right: 5px;" type="button" value="▲"/> <input style="border: none; border-radius: 50%; width: 15px; height: 15px;" type="button" value="▼"/>
 Order Items	<input style="border: none; border-radius: 50%; width: 15px; height: 15px; margin-right: 5px;" type="button" value="▲"/> <input style="border: none; border-radius: 50%; width: 15px; height: 15px;" type="button" value="▼"/>
 Inventory Transactions	<input style="border: none; border-radius: 50%; width: 15px; height: 15px; margin-right: 5px;" type="button" value="▲"/> <input style="border: none; border-radius: 50%; width: 15px; height: 15px;" type="button" value="▼"/>
 Suppliers	<input style="border: none; border-radius: 50%; width: 15px; height: 15px; margin-right: 5px;" type="button" value="▲"/> <input style="border: none; border-radius: 50%; width: 15px; height: 15px;" type="button" value="▼"/>
 Reports	<input style="border: none; border-radius: 50%; width: 15px; height: 15px; margin-right: 5px;" type="button" value="▲"/> <input style="border: none; border-radius: 50%; width: 15px; height: 15px;" type="button" value="▼"/>

6

New Lightning App

User Profiles

Choose the user profiles that can access this app.

Available Profiles

<input style="border: none; border-radius: 50%; width: 15px; height: 15px; margin-right: 5px;" type="button" value="X"/> system	<input style="border: none; border-radius: 50%; width: 15px; height: 15px;" type="button" value="X"/>
System Administrator	<input style="border: none; border-radius: 50%; width: 15px; height: 15px;" type="button" value="X"/>

Selected Profiles

<input style="border: none; border-radius: 50%; width: 15px; height: 15px; margin-right: 5px;" type="button" value="X"/> system	<input style="border: none; border-radius: 50%; width: 15px; height: 15px;" type="button" value="X"/>
System Administrator	<input style="border: none; border-radius: 50%; width: 15px; height: 15px;" type="button" value="X"/>

7

8 **Save & Finish**

Milestone 5- Fields

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)
Purchase Order	Expiry Date	Date
	Purchase Order ID(Standard)	Text
	Supplier ID	Lookup(Supplier)
	Order Date	Date
	Expected Delivery Date	Date
	Actual Delivery Date	Date
Order Item	Order Count	Roll-Up Summary (COUNT Order Item)
	Total Order Cost	Currency(16, 2)
	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

Activity 1: Creating A Text Field In Product Object

To create fields in an object: 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.

1

2

3

Object Manager

9 items. Sorted by Label

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			

4

5

Product

SETUP > OBJECT MANAGER

Fields & Relationships

4 items. Sorted by Field Label

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

6

Geolocation

Number

Percent

Phone

Picklist

Picklist (Multi-Select)

Text

Text Area

Text Area (Long)

Text Area (Rich)

Text (Encrypted) i

Time

URL

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

Allows users to define locations. Includes latitude and longitude components, and can be used to calculate distance.

Allows users to enter any number. Leading zeros are removed.

Allows users to enter a percentage number, for example, '10' and automatically adds the percent sign to the number.

Allows users to enter any phone number. Automatically formats it as a phone number.

Allows users to select a value from a list you define.

Allows users to select multiple values from a list you define.

Allows users to enter any combination of letters and numbers.

Allows users to enter up to 255 characters on separate lines.

Allows users to enter up to 131,072 characters on separate lines.

Allows users to enter formatted text, add images and links. Up to 131,072 characters on separate lines.

Allows users to enter any combination of letters and numbers and store them in encrypted form.

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.

Allows users to enter any valid website address. When users click on the field, the URL will open in a separate browser window.

Next Cancel

Step 2. Enter the details Step 2 of 4

Field Label 7

Please enter the maximum length for a text field below.

Length 9

Field Name 7

Description

Help Text

Required Always require a value in this field in order to save a record 8

Unique Do not allow duplicate values

Treat "ABC" and "abc" as duplicate values (case insensitive)

Treat "ABC" and "abc" as different values (case sensitive)

External ID Set this field as the unique record identifier from an external system

Auto add to custom report type Add this field to existing custom report types that contain this entity 1

Activity 2: Creating a TextArea Field in Product Object

To create fields in an 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 Description”.

8.Click Next, Next, then Save & New.

The screenshot shows a list of field types. The 'Text Area' option is selected and highlighted with a red box, labeled 6. The 'Next' button at the bottom right is also highlighted with a red box, labeled 7.

- Geolocation
- Number
- Percent
- Phone
- Picklist
- Picklist (Multi-Select)
- Text
- Text Area **6**
- Text Area (Long)
- Text Area (Rich)
- Text (Encrypted) **8**
- Time
- URL

Next Cancel

The screenshot shows the 'Step 2. Enter the details' screen. The 'Field Label' input field contains 'Product Description' and is highlighted with a red box, labeled 7. The 'Next' button at the top right is also highlighted with a red box, labeled 8.

Step 2. Enter the details Step 2 of 4

Field Label **7**

Field Name **8**

Description

Help Text

Required Always require a value in this field in order to save a record

Auto add to custom report type Add this field to existing custom report types that contain this entity **8**

Default Value

Activity 3: Creating A Number Field In Product Object

To create fields in an object:

- 1.Go to setup >> click on Object Manager >> type object name(Product) in quick find box >> click on the Product custom object.
- 2.Now click on “Fields & Relationships”
- 3.Click on New.
- 4.Select Data type as “Number” and click Next.
- 5.Enter Field Label as “ Current Stock Level”.
- 6.Length – 18, Decimal Places – 0.

7.Click on Next, Next and Save.

Step 2. Enter the details

Field Label: Current Stock Level 5

Please enter the length of the number and the number of decimal places. For example, a number with a length of 8 and 2 decimal places can accept values up to "12345678.90".

Length: 18 6 Number of digits to the left of the decimal point

Decimal Places: 0 7 Number of digits to the right of the decimal point

Field Name: Current_Stock_Level

Description:

Help Text:

Required Always require a value in this field in order to save a record

Unique Do not allow duplicate values

External ID Set this field as the unique record identifier from an external system

Step 2 of 4

Previous Next Cancel

Activity 4: Creating A Currency Field In Product Object

To create fields in an object:

- 1.Go to setup >> click on Object Manager >> type object name(Product) in quick find box >> click on the Product custom object.
- 2.Now click on “Fields & Relationships”
- 3.Click on New.
- 4.Select Data type as “Currency” and click Next.
- 5.Enter Field Label as “ Unit Price”.
- 6.Length – 16, Decimal Places – 2.
- 7.Select Required Field.

8.Click on Next, Next and Save.

Step 2. Enter the details

Field Label: Unit Price 5

Please enter the length of the number and the number of decimal places. For example, a number with a length of 8 and 2 decimal places can accept values up to "12345678.90".

Length: 16 6 Number of digits to the left of the decimal point

Decimal Places: 2 Number of digits to the right of the decimal point

Field Name: Unit_Price 8

Description:

Help Text:

Required Always require a value in this field in order to save a record 7

Auto add to custom report type Add this field to existing custom report types that contain this entity 7

Activity 5 : Creating Lookup Relationship In Purchase Order Object

A Lookup relationship is a type of relationship in Salesforce that connects two objects together based on a field known as the Lookup field. It establishes a relationship between a child object and a parent object, allowing the child object to reference the parent object.

To Create a relationship from Purchase Order to Supplier .

1.Go to the Setup page >> click on Object manager >> type object name(Purchase Order) in the quick find bar >> click on the Purchase Order object.

2.Click on Fields & Relationship

3.Click on New.

4.Select “Lookup relationship” as data type and click Next.

5.Select the related object “ Supplier ”.

6.Click on Next.

7.Give Field Label as “Supplier ID” .

8.Select Required Field.

9.Click on Next , Next , Next , Save.

The screenshot shows the Salesforce interface for creating a new custom field. The steps are outlined as follows:

- Step 1: Data Type** (Red box 4): A list of data types. The "Lookup Relationship" option is selected and highlighted with a red box.
- Step 2: Choose the related object** (Red box 5): A dropdown menu labeled "Related To" with "Supplier" selected.
- Step 3: Field Definition** (Red box 6): Fields for "Field Label" (Supplier ID), "Field Name" (Supplier_ID), "Description", and "Help Text".
- Step 4: Child Relationship** (Red box 7): Fields for "Child Relationship Name" (Purchase_Orders), "Required" (checkbox checked), and "What to do if the lookup record is deleted?".
- Step 5: Advanced Options** (Red box 8): Fields for "Auto add to custom report type".
- Step 6: Next Step** (Red box 9): Buttons for "Previous", "Next", and "Cancel".

Activity 6: Creating A Date Field In Purchase Order Object

To create fields in an 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. Now click on “Fields & Relationships”
3. Click on New.
4. Select Data type as “Date” and click Next.

5.Enter Field Label as “ Order Date”.

6.Click on Next, Next and Save.

Step 2. Enter the details

Field Label 5

Field Name 6

Description

Help Text

Required Always require a value in this field in order to save a record

Auto add to custom report type Add this field to existing custom report types that contain this entity

Default Value
Use formula syntax: Enclose text and picklist value API names in double quotes : ("the_text"), include numbers without quotes : (25), show percentages as decimals: (0.10), and express date calculations in the standard format: (Today() + 7). To reference a field from a Custom Metadata type record use: \$CustomMetadata.Type__mdt.RecordAPIName.Field__c

Step 2 of 4

Previous Next Cancel

Activity 7: Creating A Roll-Up Summary Field In Purchase Order Object

To create fields in an 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.Now click on “Fields & Relationships”

3.Click on New.

4.Select Data type as “Roll-Up Summary” and click Next.

5.Enter Field Label as “ Order Count”.

6.Choose the Summarized Object as “Order Items”.

7.For Select Roll-Up Type select “Count”.

8.Click on Next, Next and Save.

Data Type

None Selected

Select one of the data types below.

Auto Number

A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.

Formula

A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.

Roll-Up Summary

A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.

4

Step 2. Enter the details Step 2 of 5

Field Label **5**

Field Name

Description

Help Text

Auto add to custom report type Add this field to existing custom report types that contain this entity

Previous **Next** **Cancel**

Purchase Order
New Custom Field

Help for this Page

Step 3. Define the summary calculation Step 3 of 5

Select Object to Summarize

Master Object Summarized Object **6**

Select Roll-Up Type

COUNT **7**

SUM
 MIN
 MAX

Field to Aggregate

Filter Criteria

All records should be included in the calculation
 Only records meeting certain criteria should be included in the calculation

Activity 8: Creating A Unit Price Formula Field In Order Item Object

To create fields in an object:

- 1.Go to setup >> click on Object Manager >> type object name(Order Item) in quick find box >> click on the Order Item object.
- 2.Now click on “Fields & Relationships”
- 3.Click on New.
- 4.Select Data type as “Formula” and click Next.
- 5.Enter field label Unit Price.
- 6.Select formula return type Currency, Click Next
- 7.Create and insert Advance formula: Product_ID__r.Unit_Price__c
- 8.Click Next, Next, then Save

Step 2. Choose output type Step 2 of 5

Field Label 5 Field Name [i](#)

Auto add to custom report type Add this field to existing custom report types that contain this entity [i](#)

Formula Return Type

None Selected Select one of the data types below.

Checkbox Calculate a boolean value
Example: `TODAY() > CloseDate`

Currency 6 Calculate a dollar or other currency amount and automatically format the field as a currency amount.
Example: `Gross Margin = Amount - Cost__c`

Date Calculate a date, for example, by adding or subtracting days to other dates.
Example: `Reminder Date = CloseDate - 7`

Date/Time Calculate a date/time, for example, by adding a number of hours or days to another date/time.
Example: `Next = NOW() + 1`

Number Calculate a numeric value.
Example: `Fahrenheit = 1.8 * Celsius__c + 32`

Percent Calculate a percent and automatically add the percent sign to the number.

Order Item New Custom Field Help for this Page [?](#)

Step 3. Enter formula Step 3 of 5

Enter your formula and click Check Syntax to check for errors. Click the Advanced Formula subtab to use additional fields, operators, and functions.

Example: `Gross Margin = Amount - Cost__c` [More Examples](#)

Simple Formula Advanced Formula

Insert Field Insert Operator [▼](#)

Unit Price (Currency) = 7

Functions [-- All Function Categories --](#)

- ABS
- ACOS
- ADDMONTHS
- AND
- ASCII
- ASIN

[Insert Selected Function](#)

Previous Next Cancel Quick Tips 8

- Getting Started
- Operators & Functions

Activity 9: Creating A Amount Formula Field In Order Item Object

To create fields in an object:

- 1.Go to setup >> click on Object Manager >> type object name(Order Item) in quick find box >> click on the Order Item object.
- 2.Now click on “Fields & Relationships”
- 3.Click on New.
- 4.Select Data type as “Formula” and click Next.
- 5.Enter field label Amount.
- 6.Select formula return type Currency, Click Next
- 7.Create and insert Advance formula: `Quantity__Received__c * Unit__Price__c`

8.Click Next, Next, then Save.

The screenshot shows the Salesforce formula editor interface. At the top, there are tabs for "Simple Formula" and "Advanced Formula", with "Simple Formula" selected. Below the tabs is a toolbar with "Insert Field" and "Insert Operator". A dropdown menu labeled "Functions" is open, showing a list of mathematical functions like ABS, ACOS, ADDMONTHS, AND, ASCII, and ASIN. The formula field contains the expression "Amount (Currency) = Quantity_Received__c * Unit_Price__c". A red box highlights this formula field, and a red number "7" is positioned to its right.

Activity 10:Creating A Pick list Field In Inventory Transaction Object

To create fields in an object:

1.Go to setup >> click on Object Manager >> type object name(Inventory Transaction) in quick find box>> click on the Inventory Transaction Object.

2.Now click on “Fields & Relationships” .

3.Click on New.

4.Select Data type as “Pick list” and click Next.

5.Enter Field Label as “Transaction Type”.

6.In values select “Enter values, with each value separated by a new line” and enter values as shown below.

- Receipt
- Issue
- Adjustment



7.Click on Next, Next and Save.

Activity 11: Creating A Total Order Cost Formula Field In Inventory Transaction Object

To create fields in an object:

1.Go to setup >> click on Object Manager >> type object name(Inventory Transaction) in quick find box >> click on the Order Item object.

2.Now click on “Fields & Relationships”

3.Click on New.

4. Select Data type as “Formula” and click Next.
5. Enter field label Total Order Cost.
6. Select formula return type Currency, Click Next
7. Create and insert Advance formula: Purchase_Order__r.Total_Order_Cost__c
8. Click Next, Next, then Save.

Activity 12: Creating A Phone Field In Supplier Object

To create fields in an object:

1. Go to setup >> click on Object Manager >> type object name(Supplier) in quick find box>> click on the Supplier object.
2. Now click on “Fields & Relationships”
3. Click on New.
4. Select Data type as “Phone” and click Next.
5. Enter the Field Label as “ Phone Number”.
6. Select Required Field.
7. Click on Next, Next and Save.

Step 2. Enter the details

Field Label: 5

Field Name: 7

Description:

Help Text:

Required Always require a value in this field in order to save a record 6

Auto add to custom report type Add this field to existing custom report types that contain this entity

Default Value: Show Formula Editor

Use formula syntax. Enclose text and picklist values in double quotes ("the_text"). Include numbers without quotes (25), show percentages as decimals (.10), and express date calculations in the standard format: (Today() + 7). To reference a field from a Custom Metadata type record use: \$CustomMetadata.Type__mdt.RecordAPIName.Field__c

Activity 13: Creating A Email Field In Supplier Object

To create fields in an object:

1. Go to setup >> click on Object Manager >> type object name(Supplier) in quick find box>> click on the Supplier object.

2. Now click on “Fields & Relationships”

3. Click on New.

4. Select Data type as “Email” and click Next.

5. Enter the Field Label as “ Email”.

6. Click on Next, Next and Save.

Step 2. Enter the details

Field Label: Email 5

Field Name: Email

Description:

Help Text:

Required: Always require a value in this field in order to save a record

Unique: Do not allow duplicate values

External ID: Set this field as the unique record identifier from an external system

Auto add to custom report type: Add this field to existing custom report types that contain this entity 6

Default Value: Show Formula Editor

Use formula syntax: Enclose text and picklist value API names in double quotes: ("the_text"), include numbers without quotes

Milestone 6 -Editing Of Page Layouts

Activity 1: To Edit 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.

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

Fields

Buttons
Quick Actions
Mobile & Lightning Actions
Expanded Lookups
Related Lists
Report Charts

Quick Find Field Name *

Section	Last Modified By	Product ID
Blank Space	Minimum Stock Level	Product Name
Created By	Owner	Unit Price
Current Stock Level	Product Description	

Information (Header visible on edit only)

Product ID	Sample Text	Unit Price	₹123.45
Product Name	Sample Text	Current Stock Level	12,420
Product Description	Sample Text	Minimum Stock Level	21,114
		Owner	Sample Text

System Information (Header visible on edit only)

Created By	Sample Text	Last Modified By	Sample Text
------------	-------------	------------------	-------------

3. Drag and Arrange the field as shown below.

Activity 2: To Edit A Page Layout In 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 >> Page Layouts.

2.Click on the Purchase Order Layout

3.Drag and Arrange the field as shown below.

The screenshot shows the 'Layout Properties' screen for the Purchase Order page layout. The 'Fields' section on the left lists various actions and lookups. The main area contains several sections of fields:

- Information (Header visible on edit only):**
 - Purchase Order ID: Sample Text
 - Supplier ID: Sample Text
 - Order Date: 07/07/2024
 - Expected Delivery Date: 07/07/2024
 - Actual Delivery Date: 07/07/2024
 - Order Count: 36,243
 - Total Order Cost: ₹123.45
 - Owner: Sample Text
- System Information (Header visible on edit only):**
 - Created By: Sample Text
 - Last Modified By: Sample Text

4.Click on field Order Date >> click on settings >> select Required and save it.

5.Click on field Total Order Cost >> click on settings >> select Read Only and save it.

6.Click Save.

Activity 3: To Edit A Page Layout In Order Item Object

1.Go to setup >> click on Object Manager >> type object name(Order Item) in quick find box >> click on the Order Item object >> Page Layouts.

2.Click on the Order Item Layout

3.Drag and Arrange the field as shown below.

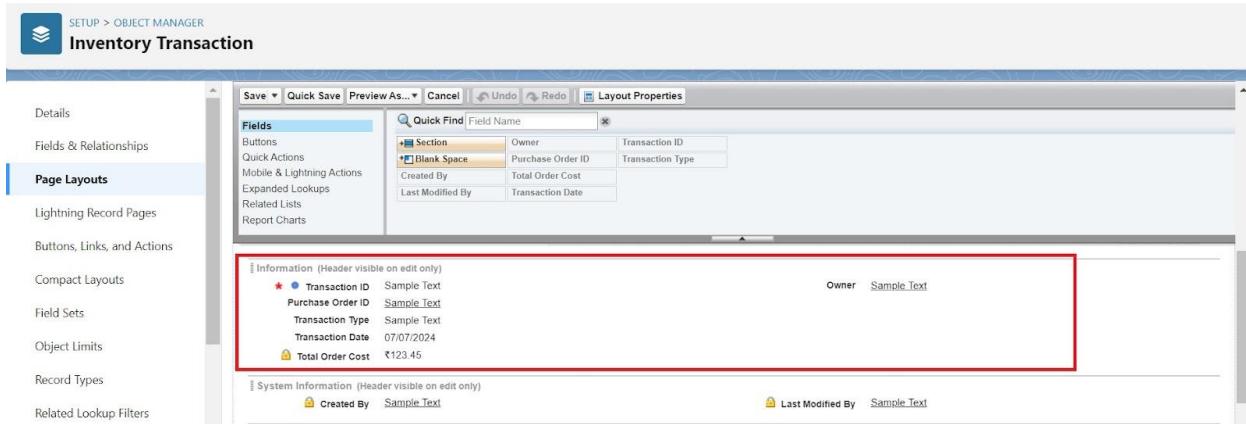
The screenshot shows the 'Layout Properties' screen for the Order Item page layout. The 'Fields' section on the left lists various actions and lookups. The main area contains several sections of fields:

- Information (Header visible on edit only):**
 - Order Item ID: Sample Text
 - Amount: ₹123.45
 - Purchase Order ID: Sample Text
- Product details:**
 - Product ID: Sample Text
 - Unit Price: ₹123.45
 - Quantity Ordered: 23,712
 - Quantity Received: 33,407
- System Information (Header visible on edit only):**
 - Created By: Sample Text
 - Last Modified By: Sample Text

4.Click Save.

Activity 4: To Edit A Page Layout In Inventory Transaction Object

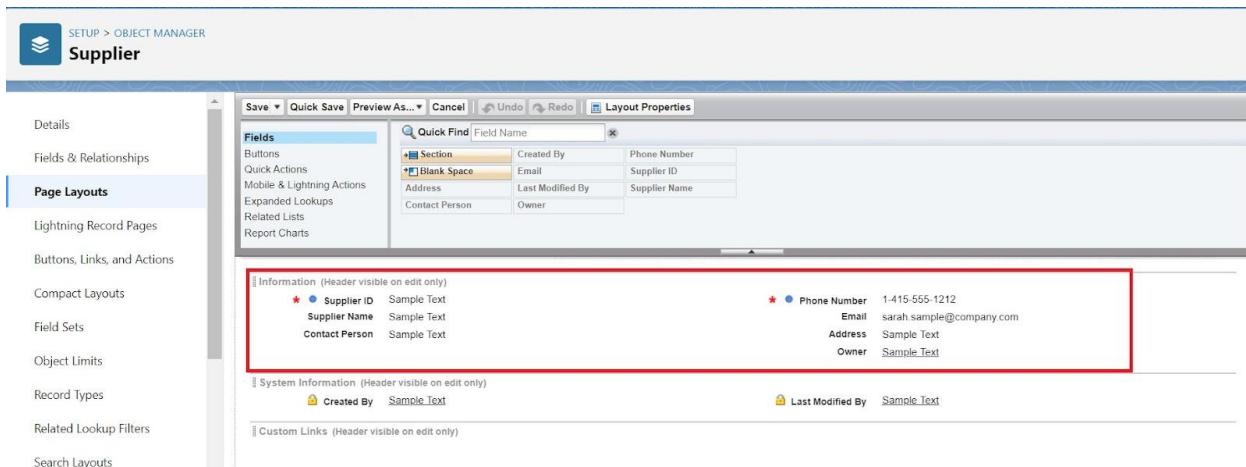
- 1.Go to setup >> click on Object Manager >> type object name(Inventory Transaction) in quick find box >> click on the Inventory Transaction object >> Page Layouts.
- 2.Click on the Inventory Transaction Layout
- 3.Drag and Arrange the field as shown below.



- 4.Click Save.

Activity 5: To Edit A Page Layout In Supplier Object

- 1.Go to setup >> click on Object Manager >> type object name(Supplier) in quick find box >> click on the Supplier object >> Page Layouts.
- 2.Click on the Supplier Layout
- 3.Drag and Arrange the field as shown below



- 4.Click Save.

Milestone 7 – Compact Layouts

Compact layouts display a record's key fields at a glance, providing important information quickly without needing to open the record.

Activity 1: To create 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.

The screenshot shows the Salesforce Object Manager for the 'Product' object. The left sidebar has 'Compact Layouts' selected, indicated by a red box labeled '2'. The main area displays a table for 'Compact Layouts' with one item: 'System Default' (API Name: SYSTEM). A red box labeled '3' is next to the 'LAST MODIFIED' column. The 'New' button is highlighted with a red box labeled '4'. The 'Enter Compact Layout Information' section shows 'Label: Product Compact Layout' and 'Name: Product_Compact_Layout'. The 'Select Compact Layout Fields' section shows the 'Available Fields' list (Created By, Last Modified By, Minimum Stock Level, Owner, Product ID) and the 'Selected Fields' list (Product Name, Unit Price, Current Stock Level), which is also highlighted with a red box labeled '5'. A note at the bottom says 'Use SHIFT + click to select adjacent fields. Use CTRL + click to select an assortment of fields.' The bottom bar has a red box labeled '6' over the 'Save' button.

Product Compact Layouts
Compact Layout Assignment

This screenshot shows the 'Compact Layout Assignment' page. At the top, there are 'Save' and 'Cancel' buttons. Below them, a section titled 'Primary Compact Layout' contains the instruction: 'Select the compact layout to use when this object's records appear as list items in the mobile app.' A dropdown menu labeled 'Primary Compact Layout: Product Compact Layout' is highlighted with a red box and has the number '9' next to it. At the bottom of the page are 'Save' and 'Cancel' buttons again, with the number '10' next to the 'Save' button.

Activity 2: To create a Compact Layout 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 Compact Layouts in the sidebar .
- 3.Click on New.
- 4.Enter the Label as “Purchase Order Compact Layout”.
- 5.Select the Compact Layout Fields : Select Purchase Order ID, Order Date, Total Order Cost, Supplier ID.
- 6.Click Save.
- 7.Click Compact Layout Assignment.
- 8.Click Edit Assignment.
- 9.Choose “Purchase Order Compact Layout” from the dropdown.
- 10.Click Save.

This screenshot shows the 'Compact Layout Edit' page. At the top, there are 'Save' and 'Cancel' buttons. The main area is divided into two sections: 'Enter Compact Layout Information' and 'Select Compact Layout Fields'. In 'Enter Compact Layout Information', the 'Label' field is set to 'Purchase Order Compact L' and the 'Name' field is set to 'Purchase_Order_Compact'. In 'Select Compact Layout Fields', there are two columns: 'Available Fields' (Actual Delivery Date, Created By, Expected Delivery Date, Last Modified By, Owner, Order Count) and 'Selected Fields' (Purchase Order ID, Order Date, Total Order Cost, Supplier ID). The 'Supplier ID' field is highlighted with a red box and has the number '4' next to it. The 'Selected Fields' column also has a red box around it and has the number '5' next to it. At the bottom, there is a note: 'Use SHIFT + click to select adjacent fields. Use CTRL + click to select an assortment of fields.' and 'Save' and 'Cancel' buttons again, with the number '6' next to the 'Save' button.

Purchase Order Compact Layouts
Compact Layout Assignment

10

Save Cancel

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: Purchase Order Compact Layout ▾ 9

Save Cancel

Milestone 8 – Validation Rules

Activity 1: To create an Expected Delivery Date Validation rule to a Employee 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 :

(Expected _Delivery _Date __c - Order _Date __c)> 7

Help for this Page ⓘ

Purchase Order Validation Rule

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: 4

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

Functions

-- All Function Categories -- ▾

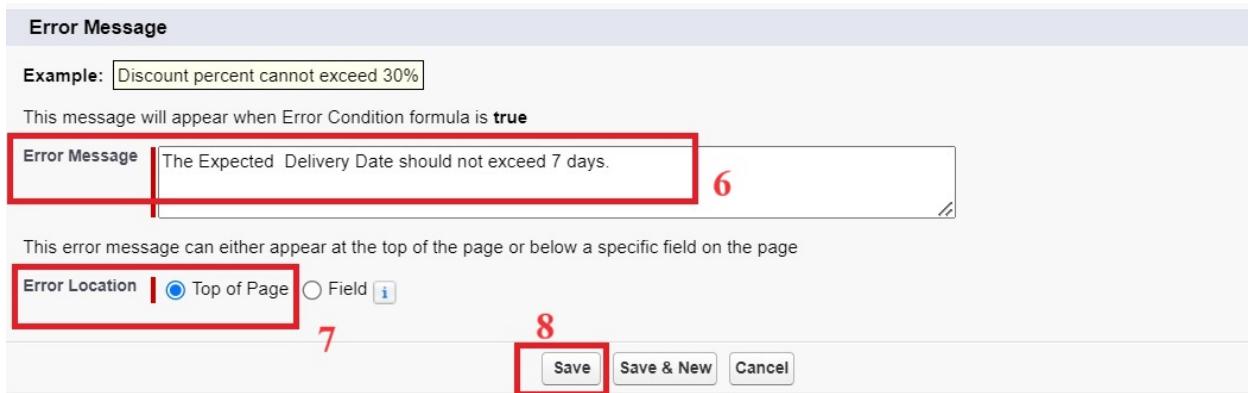
- ABS
- ACOS
- ADDMONTHS
- AND
- ASCII
- ASIN

Insert Field Insert Operator ▾ 5

(Expected_Delivery_Date__c - Order_Date__c)> 7

- 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.



Milestone 9 – Profiles

Profiles in Salesforce are fundamental to the platform's security model, defining what users can do within the organization. Profiles control a user's permissions to objects, fields, tabs, apps, and other settings. Each user in Salesforce must be assigned a profile, and the profile assigned to a user determines what they can see and do in the system.

Activity 1: To create an Inventory Manager Profile

1.Go to setup >> type profiles in quick Find box >> click on profiles >> clone the desired profile (Standard User) >> enter profile name (Inventory Manager) >> Save.

The screenshot shows the 'Profiles' page in the Salesforce Setup. The left sidebar has 'Profiles' selected. The main area shows a list of profiles with columns for Action, Profile Name, User License, and Custom. A red box highlights the 'Edit | Clone' link next to the 'Standard User' profile. A red number '9' is placed to the right of this link. The page includes a navigation bar with links like All Profiles, Edit, Delete, Create New View, and a global search bar.

Action	Profile Name	User License	Custom
<input type="checkbox"/> Edit Clone	Salesforce API Only System Integrations	Salesforce Integration	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Silver Partner User	Silver Partner	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Solution Manager	Salesforce	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Standard Platform User	Salesforce Platform	<input type="checkbox"/>
<input checked="" type="checkbox"/> Edit Clone	Standard User	Salesforce	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	System Administrator	Salesforce	<input type="checkbox"/>

Clone Profile

Enter the name of the new profile.

You must select an existing profile to clone from.

Existing Profile	Standard User
User License	Salesforce
Profile Name	Inventory Manager

Save **Cancel**

2. While still on the profile page, then click Edit.

3. Select the Custom App settings as default for the Medical Inventory Management.

SETUP Profiles

Custom App Settings

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

4. Scroll down to Custom Object Permissions and Give access permissions as mentioned in the below diagram.

Custom Object Permissions

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

5. Change the password policies as mentioned :

6. User passwords expire in should be “ never expires ”.

7. Minimum password length should be “ 8 ”, and click save.

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:

Require a minimum 1 day password lifetime:

Don't immediately expire links in forgot password emails: [i](#)

Buttons: Save (highlighted with a red box), Save & New, Cancel

Activity 2: To create an Purchase Manager Profile

1. Go to setup >> type profiles in quick find box >> click on profiles >> clone the desired profile (Standard User) >> enter profile name (Purchase Manager) >> Save.

2. While still on the profile page, then click Edit.

3. Select the Custom App settings as default for the Medical Inventory Management.

Profile Edit

Name: Purchase Manager

User License: Salesforce

Description:

Custom Profile:

Custom App Settings

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

4. Scroll down to Custom Object Permissions and Give access permissions as mentioned in the below diagram.

Custom Object Permissions

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

5.Change the password policies as mentioned :

6.User passwords expire in should be “ never expires ”.

7.Minimum password length should be “ 8 ”, and click save.

>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

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

Milestone 10 - Roles

Activity 1 : Create a Purchasing Manager Role.

1.Go to quick find >> Search for Roles >> click on Set Up Roles.

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

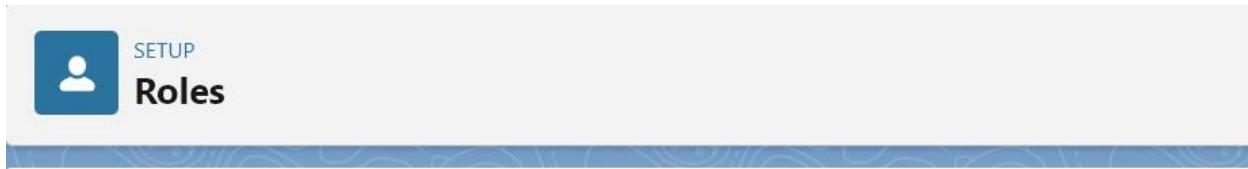
View other sample Role Hierarchies: [Territory-based Sample](#)



Set Up Roles Don't show this page again

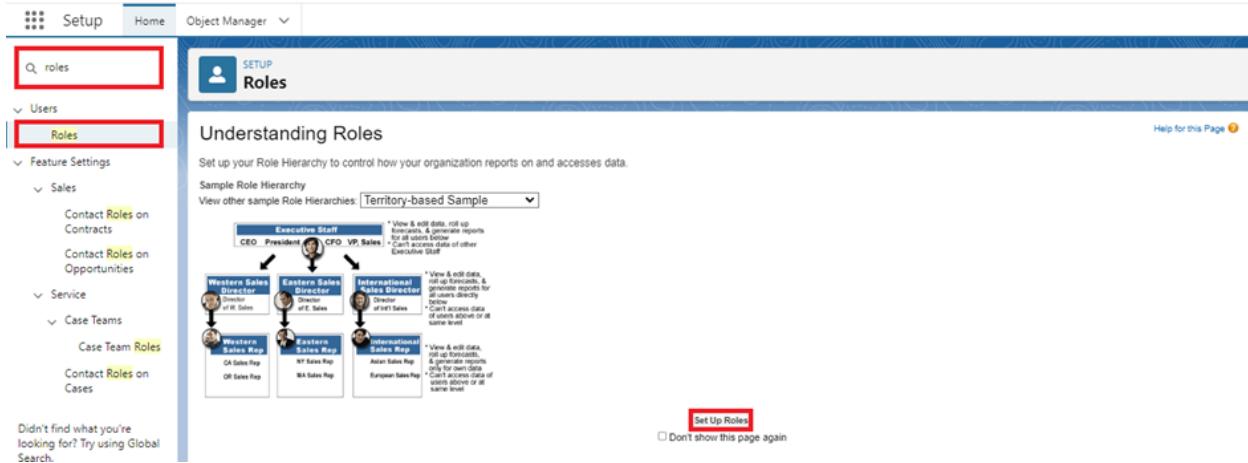
2.Click on Expand All and click on add role under SVP, Sales & Marketing role.

3.Give Label as “Purchasing Manager” and Role name gets auto populated. Then click on Save.



Activity 2 : Create a Purchasing Manager Role.

1. Go to quick find >> Search for Roles >> click on Set Up Roles.



2. Click on Expand All and click on add role under SVP, Sales & Marketing role.

3. Give Label as “Inventory Manager” and the Role name gets auto populated. Then click on Save.

The screenshot shows the Salesforce 'Role Edit' interface for creating a new role. At the top, there's a blue header bar with a user icon and the word 'SETUP'. Below it, a blue bar has the word 'Roles' in white. The main area is titled 'Role Edit' and 'New Role'. A red box highlights the input fields for 'Label' (containing 'Inventory Manager'), 'Role Name' (containing 'Inventory_Manager'), and 'This role reports to' (containing 'SVP, Sales & Marketing'). Below these fields is a section for 'Role Name as displayed on reports' with a dropdown menu. At the bottom right, there are three buttons: 'Save' (highlighted with a red box), 'Save & New', and 'Cancel'.

Milestone 12 - Permission Sets

Permission Sets in Salesforce are a powerful tool to extend user permissions beyond what is defined in their profiles. They allow administrators to grant additional access to various tools and functions without altering the user's profile. Permission sets are particularly useful for providing specialized permissions to specific users without the need to create multiple profiles.

Activity 1 : Create a Permission Set.

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

The screenshot shows the Salesforce Setup interface with the 'Permission Sets' page selected. The left sidebar includes links for 'Users', 'Permission Set Groups', and 'Custom Code'. The main area displays a table of permission sets with columns for 'Action', 'Permission Set Label', 'Description', and 'License'. A new permission set is being created, indicated by the 'New' button at the top of the list. The 'Label' field in the creation form is highlighted with a red box.

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		Cloud Integration User
<input type="checkbox"/>	DeliveryEstimationServicePermSet		Salesforce
<input type="checkbox"/>	DeliveryEstimationServicePermSet		
<input type="checkbox"/>	Experience Profile Manager		

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

The screenshot shows the 'Create Permission Set' page. The 'Label' field is highlighted with a red box and contains the value 'Purchase Manager Create Access'. The 'Save' button is also highlighted with a red box.

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

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

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

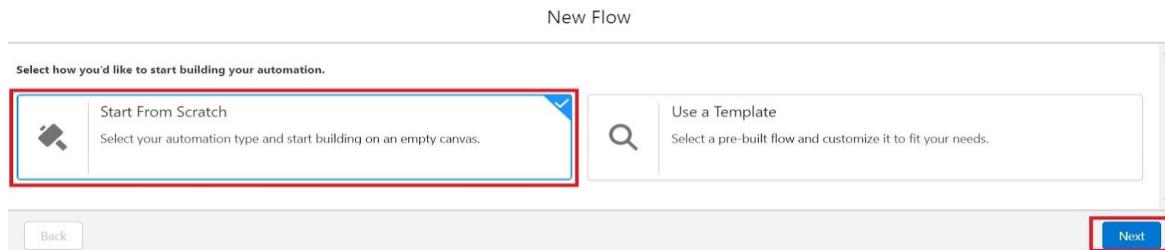
Milestone 13 – Flows

Flows in Salesforce, part of the Lightning Flow product, are powerful automation tools that help you collect data and perform actions in your Salesforce environment. Flows can be used to automate business processes, guide users through tasks, and integrate with

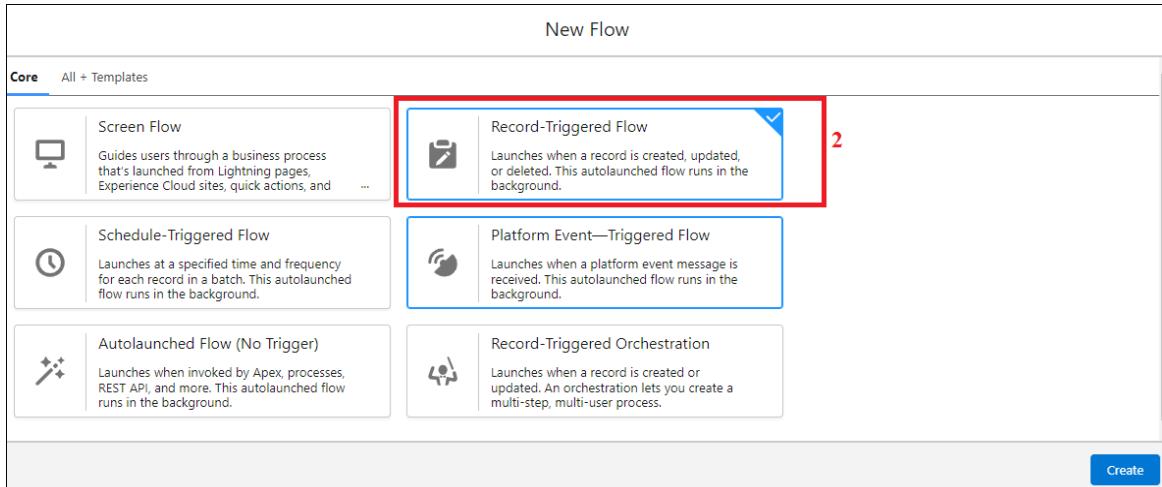
external systems. They are highly versatile and can be configured to meet a wide range of business requirements without the need for custom code.

Activity 1 : Create 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 .

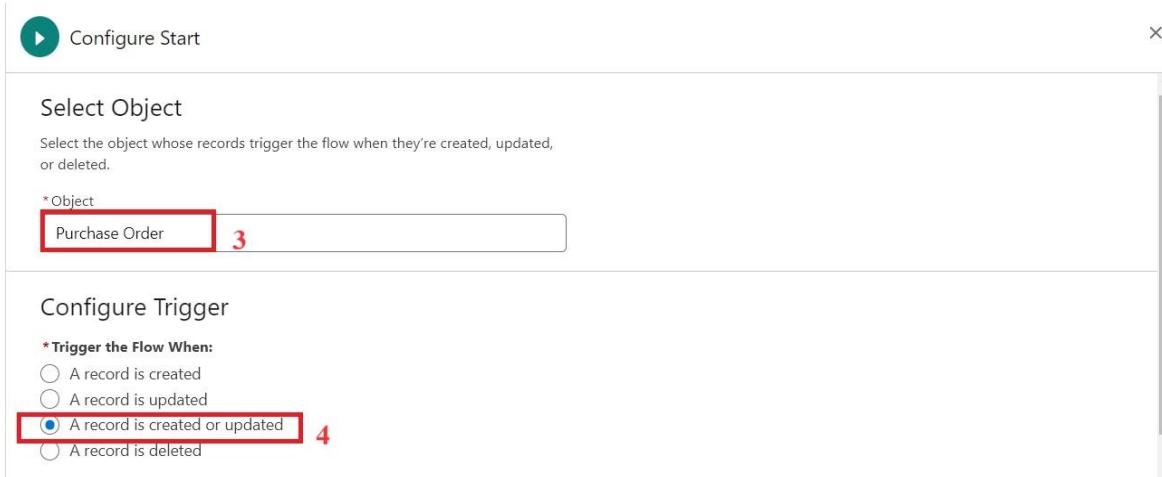


2. Select the record Triggered flow.Click on create.



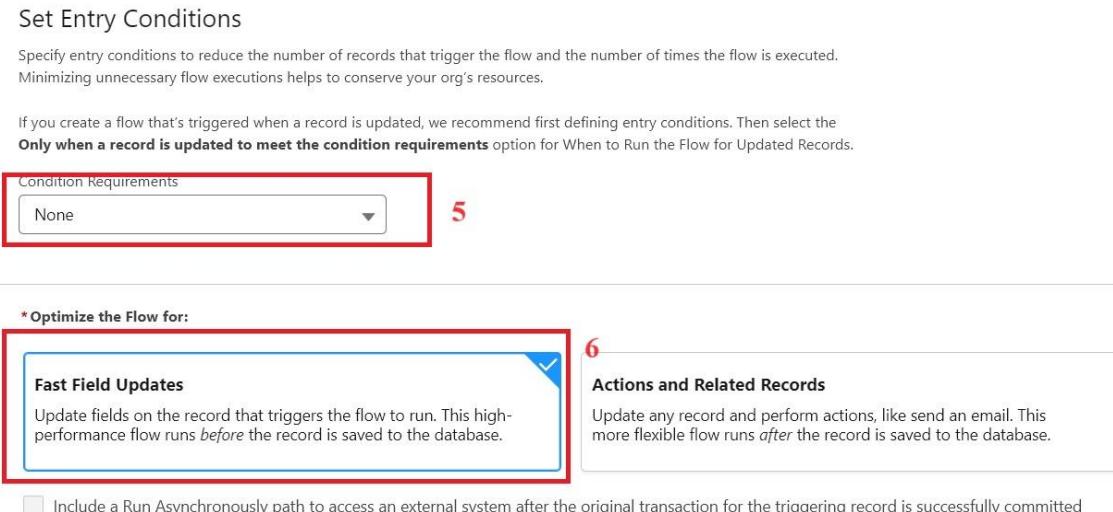
- 3.Under Object select “Purchase Order”

- 4.Select A record is created or updated



5. Set Entry Conditions : None

6. Select Fast Field Updates and click on Done



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 follow:

- Field: Id
- Operator: Equals

- Value: {!\$Record.Id}

Get Records

* Label: Get Purchase Record **8**

* API Name: Get_Purchase_Record

Description:

Get Records of This Object

* Object: Purchase Order **9**

Filter Purchase Order Records **10**

Condition Requirements: All Conditions Are Met (AND)

Field	Operator	Value
Id	Equals	Aa \$Record > Record ID X

+ 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:

1. Variable : {!ActualDeliveryDate}

Operator : Equals

Value : {!\$Record. Order _Date __c}

2. Variable : {!ActualDeliveryDate}

Operator : Add

Value : 3

= Assignment

X

*Label	* API Name
Assignment	Assignment_1
Description	

Set Variable Values

Each variable is modified by the operator and value combination.

Variable	Operator	Value
ActualDeliveryDate X	Equals	\$Record > Order Date X
Variable	Operator	Value
ActualDeliveryDate X	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}

The screenshot shows the 'Update Records' step in the Flow Builder. It includes sections for 'How to Find Records to Update and Set Their Values', 'Set Filter Conditions', and 'Set Field Values for the Purchase Order Record'. The 'How to Find Records' section has a note about running before a record is saved. The 'Set Filter Conditions' section shows 'None—Always Update Record'. The 'Set Field Values' section shows a field 'Actual_Delivery_Date__c' mapped to a value '{!ActualDeliveryDate}'.

* 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

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

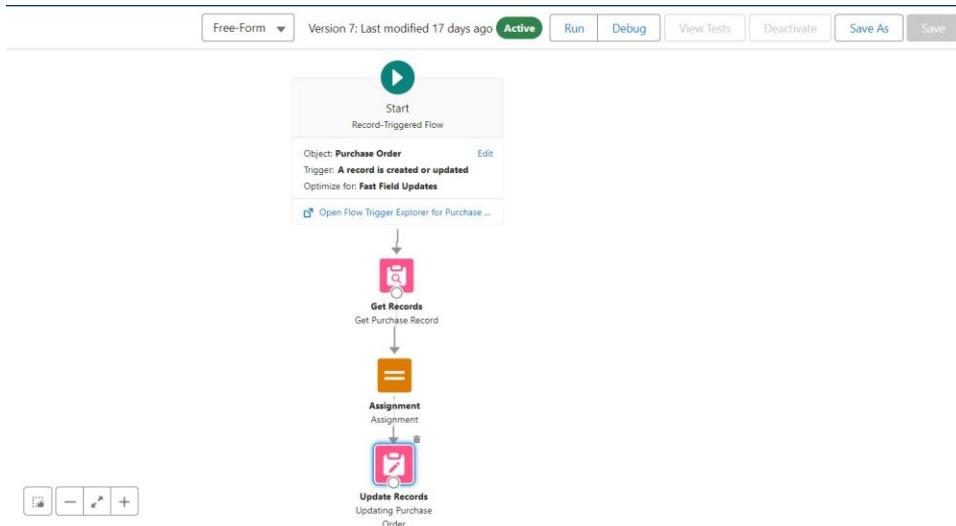
Field	Value
Actual_Delivery_Date__c	<input type="text"/> ActualDeliveryDate X

+ Add Field

24.Click Done

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

26.Activate the flow.



Milestone 14- Triggers

Triggers in Salesforce are pieces of Apex code that execute before or after specific data manipulation events on Salesforce records, such as insertions, updates, deletions, and undeletions. They are powerful tools for automating complex business logic and ensuring data integrity by enforcing custom validation rules and workflows that cannot be achieved through declarative tools alone.

Activity 1 : Create a Trigger to Calculate total amount on Order Item.

Step 1 : Login to Salesforce:

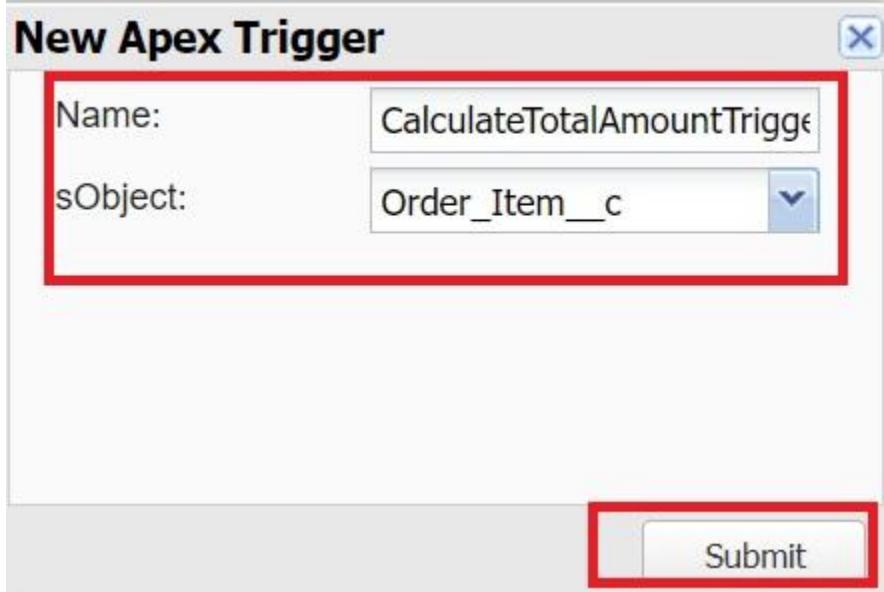
Log in to your Salesforce account with administrative privileges.

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 newItem : newItems) {

            ParentIds.add(newItem.Purchase_Order_Id __c);

        }

    }

    // For update and delete scenarios

    If (isUpdate || isDelete) {

        For (Order_Item __c oldItem : oldItems) {

            ParentIds.Add (oldItem.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 (Aggregate Result aggr : aggrList) {

    Id purchase Order Id = (Id) aggr . get('Purchase _Order _Id __c');

    Decimal total Amount = (Decimal) aggr. get('total Amount');

    Purchase To Update Map. put(purchase Order Id, total Amount);

}

// Prepare Purchase Order records for update

List<Purchase _Order __c> purchase To Update = new List<Purchase _Order __c>();

For (Id purchase Order Id : purchase To Update Map. key Set()) {

    Purchase _Order __c purchase Order = new Purchase _Order __c(Id = purchase
Order Id, Total _Order _cost __c = purchase To Update Map. get (purchase Order Id));

    Purchase To Update. add(purchase Order);

}

// Update Purchase Orders if there are any changes

If (!purchase To Update .isEmpty()) {

    Update purchase To Update;

}

}

}

Save it.

```

Milestone 15 – Reports

Reports in Salesforce provide a powerful way to visualize and analyze data stored in your Salesforce organization. They allow users to create, customize, and share different types of reports based on data from standard and custom objects. Reports help organizations make informed decisions by providing insights into key metrics, trends, and performance indicators.

Activity 1: Create 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

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

- 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”)

The screenshot shows the 'Purchase Orders based on Suppliers' report in the Medical Inventory Management App. The report interface includes:

- Fields:** Groups (highlighted with a red box) and Columns (highlighted with a red box).
- Report Buttons:** Save & Run (highlighted with a red box), Save, Close, Run, and Update Preview Automatically (highlighted with a red box).
- Table Data:** A grid showing purchase orders grouped by Supplier ID. The columns are Supplier ID, Purchase Order: Purchase Order ID, Order Count, and Total Order Cost.

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

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:

Activity 2: Create 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

Filters

🔍

Show Me
All purchase orders

Actual Delivery Date
All Time

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

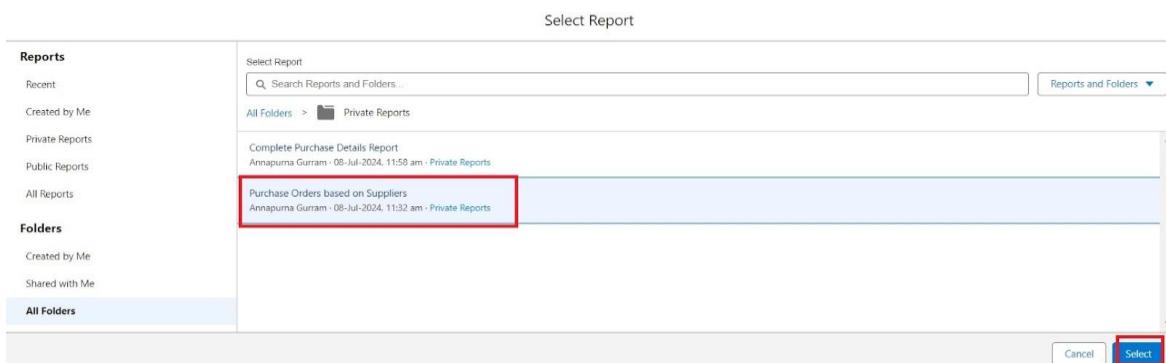
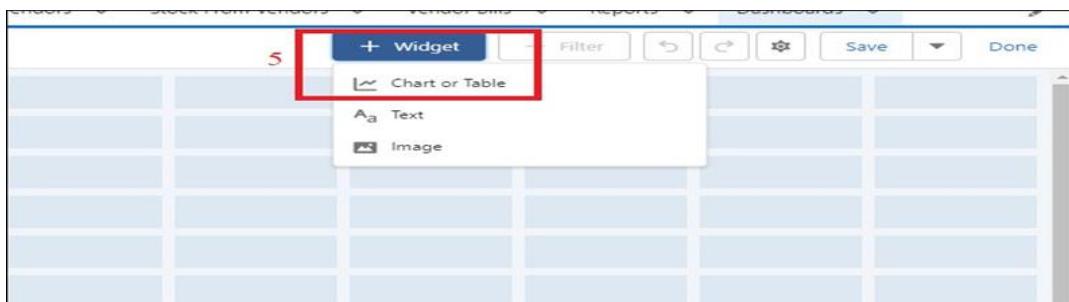
The screenshot shows a report interface for 'Purchase Orders with Order Items and Product ID'. The top navigation bar includes 'Products', 'Purchase Orders', 'Order Items', 'Inventory Transactions', 'Suppliers', 'Reports', and 'Dashboards'. The report title is 'Complete Purchase Details Report'. On the left, there are 'Outline' and 'Filters' sections. The 'Outline' section has a 'Groups' section containing 'Supplier ID', 'Actual Delivery Date', and 'Purchase Order: Purchase Order ID'. The 'Columns' section contains 'Product ID: Product ID', '# Order Count', 'Product ID: Product Name', '# Quantity Received', and '# Amount'. The main area displays a grid of purchase details 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. Subtotals are shown for each group. A red box highlights the 'Save & Run' button in the top right. Another red box highlights the 'Update Preview Automatically' checkbox. At the bottom, there are buttons for 'Row Counts', 'Detail Rows', 'Subtotals', 'Grand Total', and 'Conditional Formatting'.

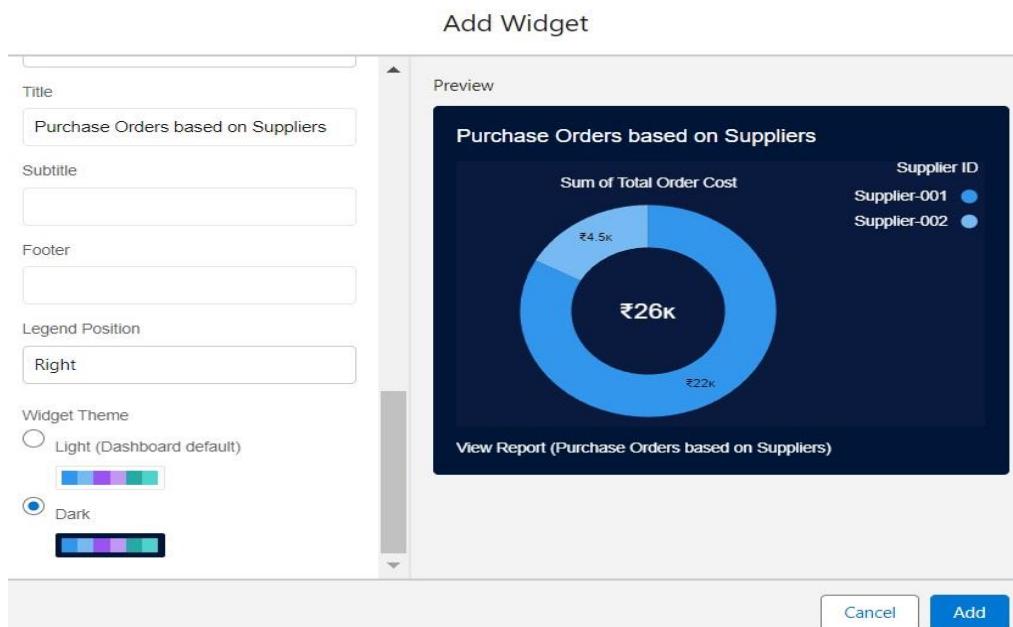
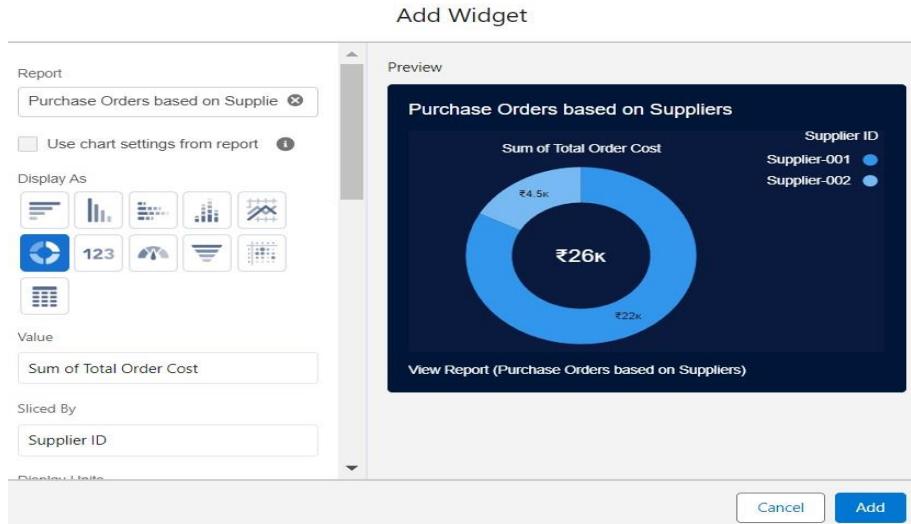
Milestone 16 – Dashboards

Dashboards in Salesforce are dynamic visual representations of key metrics and data from reports, providing a consolidated view of organizational performance and trends. They are powerful tools for monitoring real-time data, tracking progress towards goals, and gaining actionable insights at a glance. Dashboards consist of components such as charts, tables, metrics, and gauges that display data from underlying reports.

Activity 1: - Create 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.

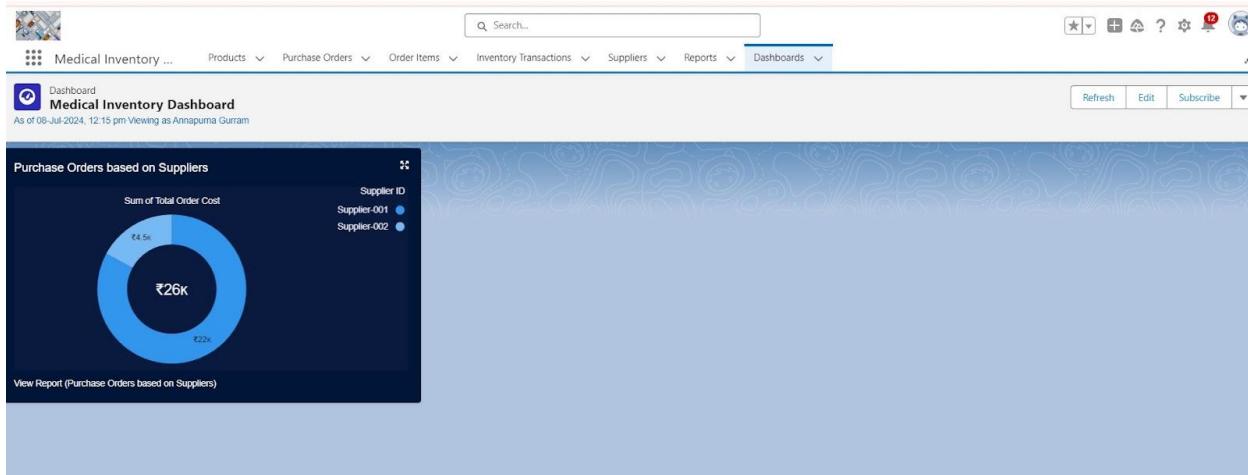




Activity 2: View Dashboard

1. Click on App Launcher on the left side of the screen.
2. Search Medical Inventory Management & click on it.
3. Click on Dashboard Tab.

4. Click on Medical Inventory Dash Board see graph view of records



CONCLUSION:

By leveraging the Salesforce platform, the project successfully established a transparent and efficient system for managing medical inventory in hospitals and healthcare centers. Through real-time tracking of medicines, medical equipment, and supplies, the project ensured timely availability of resources, reduced wastage, and improved patient care outcomes.

The project “Medical Inventory Management using Salesforce” has been successfully implemented and demonstrates the practical use of Salesforce CRM for healthcare optimization.

Project Achievements:

- Streamlined the process of tracking and managing medicines, consumables, and equipment.
- Ensured real-time updates of stock availability, expiries, and re-order levels.
- Automated workflows for purchase orders, supplier coordination, and stock replenishment.
- Improved transparency using dashboards, reports, and alerts.
- Enhanced usability with Lightning App, Home Page, and role-based security for doctors, pharmacists, and administrators.

Student Learning Outcomes:

- Hands-on skills in Salesforce CRM customization for healthcare operations.
- Improved problem-solving through real-time inventory management use cases.
- Experience in developing automated workflows for critical healthcare processes.

- Collaboration and teamwork in handling requirement analysis, development, and testing.
- Exposure to industry-relevant tools and healthcare project lifecycle management.

Future Scope:

- Integration with IoT devices to track medical equipment usage and maintenance.
- Use of AI and predictive analytics to forecast medicine demand and prevent shortages.
- Collaboration with suppliers, pharmacies, and distributors for seamless inventory flow.
- Expansion to a multi-hospital and multi-region system for large-scale healthcare networks.
- Integration with mobile apps for doctors, pharmacists, and patients to improve accessibility.