

MEDICAL INVENTORY MANAGEMENT

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1.INTRODUCTION:

1.1 Project Overview

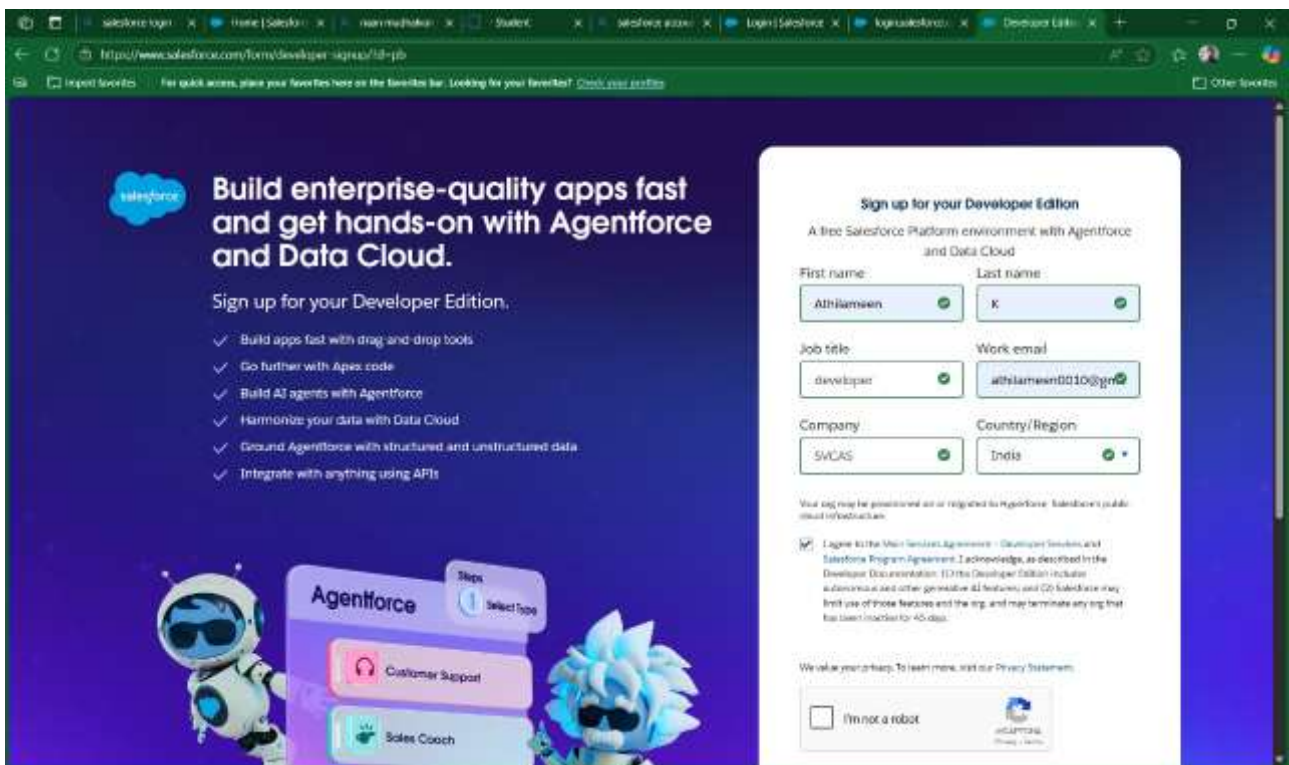
Effective inventory management is critical in healthcare settings to ensure the availability of essential medical supplies, equipment and pharmaceuticals. Medical inventory management involves tracking , storing and managing these resources to meet patient needs while minimizing waste, reducing costs and maintaining regulatory compliance.

1.2 Purpose

The primary purpose of Medical inventory management is to ensure the efficient and effective management of medical supplies, equipment and pharmaceuticals in healthcare settings.

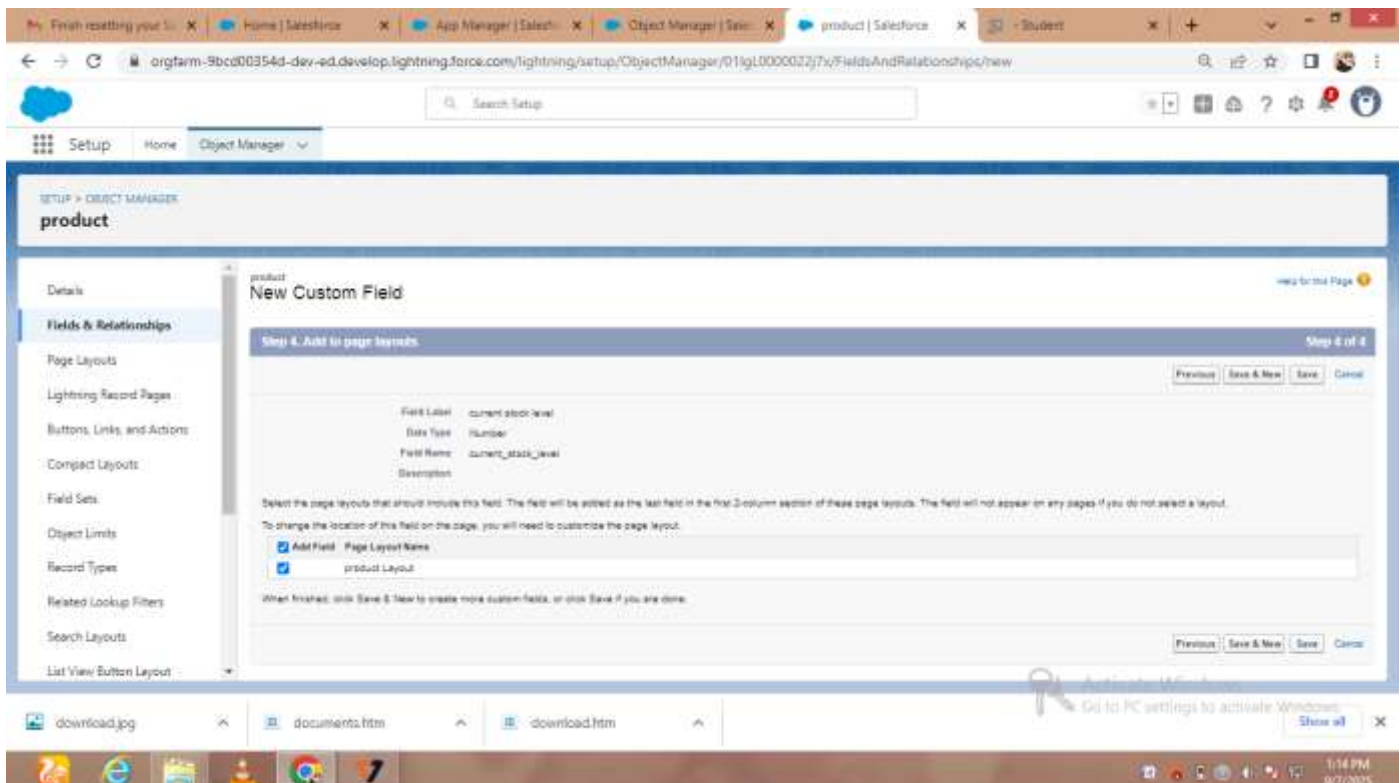
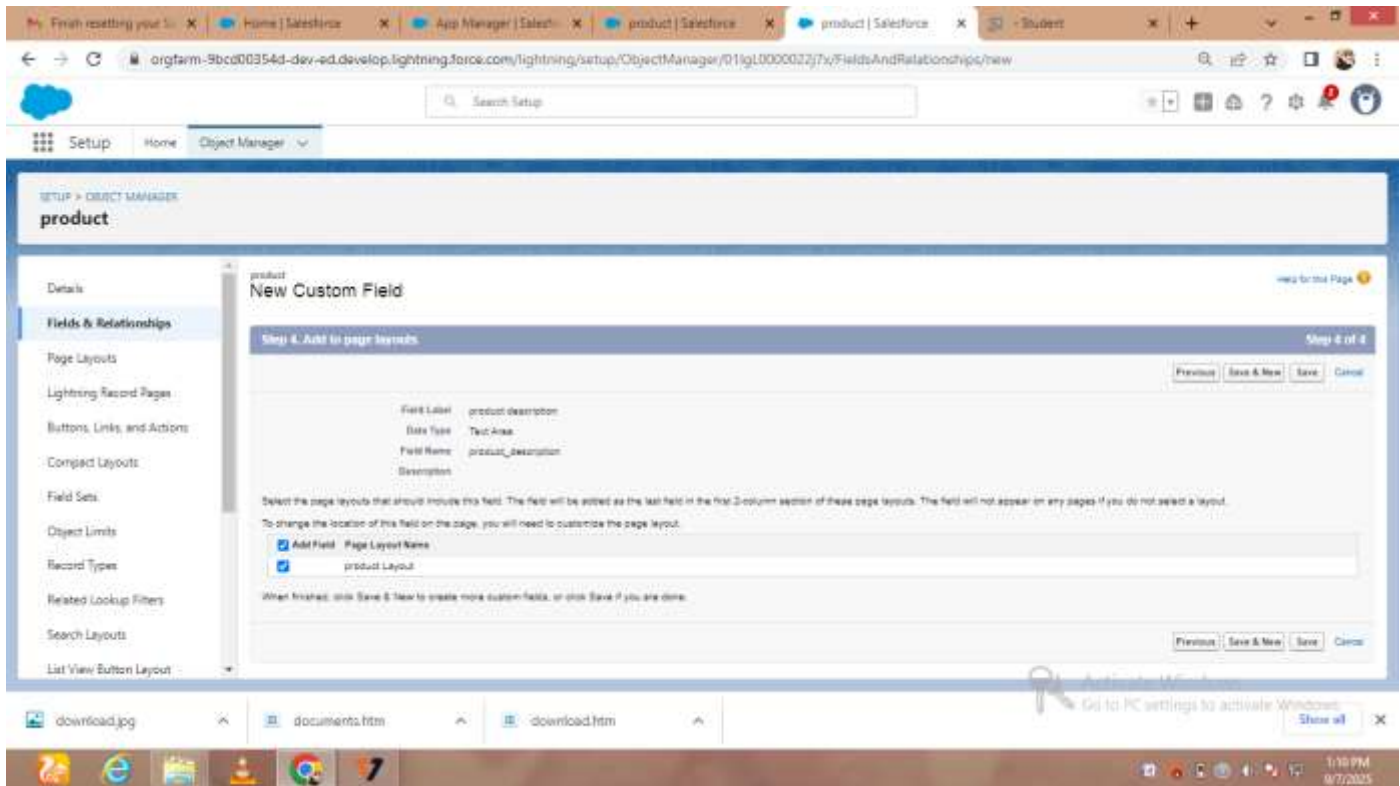
DEVELOPMENT PHASE:

- Creating developer account.



The screenshot shows the Salesforce Developer Edition sign-up page. The page has a dark blue header with the Salesforce logo and the text "Build enterprise-quality apps fast and get hands-on with Agentforce and Data Cloud." Below this, it says "Sign up for your Developer Edition." and lists several benefits: "Build apps fast with drag-and-drop tools", "Go further with Apex code", "Build AI agents with Agentforce", "Harmonize your data with Data Cloud", "Ground Agentforce with structured and unstructured data", and "Integrate with anything using APIs". On the right side, there is a sign-up form titled "Sign up for your Developer Edition" with the subtitle "A free Salesforce Platform environment with Agentforce and Data Cloud." The form includes fields for "First name" (Athilameen), "Last name" (K), "Job title" (developer), "Work email" (athilameen0010@gmail.com), "Company" (SWCS), and "Country/Region" (India). Below the form, there is a checkbox for "I agree to the Salesforce Terms of Service" and a checkbox for "I'm not a robot".

- Creating a product object.



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orgfarm-9bcd00354d-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/011gL0000002j7x/FieldsAndRelationships/new

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER

product

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

product

New Custom Field

Step 4: Add to page layouts

Previous Save & New Save Cancel

Field Label	unit price
Data Type	Currency
Field Name	unit_price
Description	

Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.

To change the location of this field on the page, you will need to customize the page layout.

Add Field Page Layout Name

☒ product Layout

When finished, click Save & New to create more custom fields, or click Save if you are done.

Previous Save & New Save Cancel

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1:17 PM 9/7/2025

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orgfarm-9bcd00354d-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/011gL0000002j8j/FieldsAndRelationships/new

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER

purchase order

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

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Record Types

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Search Layouts

List View Button Layout

purchase order

New Relationship

Step 5: Add reference field to Page Layouts

Previous Next Cancel

Field Label	supplier
Data Type	Lookup
Field Name	supplier
Description	

Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.

To change the location of this field on the page, you will need to customize the page layout.

Add Field Page Layout Name

☒ purchase order Layout

Previous Next Cancel

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- Creating new Custom field id

The screenshot shows the Salesforce Setup interface for the 'inventory transaction' object. The left sidebar contains a navigation menu with options like Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, and List View Button Layout. The main content area is titled 'New Custom Field' and is at 'Step 4 of 4: Add to page layouts'. It displays the following field details:

Field Label	transaction type
Data Type	Picklist
Field Name	transaction_type
Description	

Below the details, there is a section for selecting page layouts. It states: 'Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout. To change the location of this field on the page, you will need to customize the page layout.' There is a checkbox labeled 'Add Field' and a text input for 'Page Layout Name'. The 'Add Field' checkbox is checked, and the 'Page Layout Name' is 'inventory transaction Layout'. At the bottom, there are buttons for 'Previous', 'Save & New', 'Save', and 'Cancel'. A watermark 'Arshad Wani' is visible in the bottom right corner.

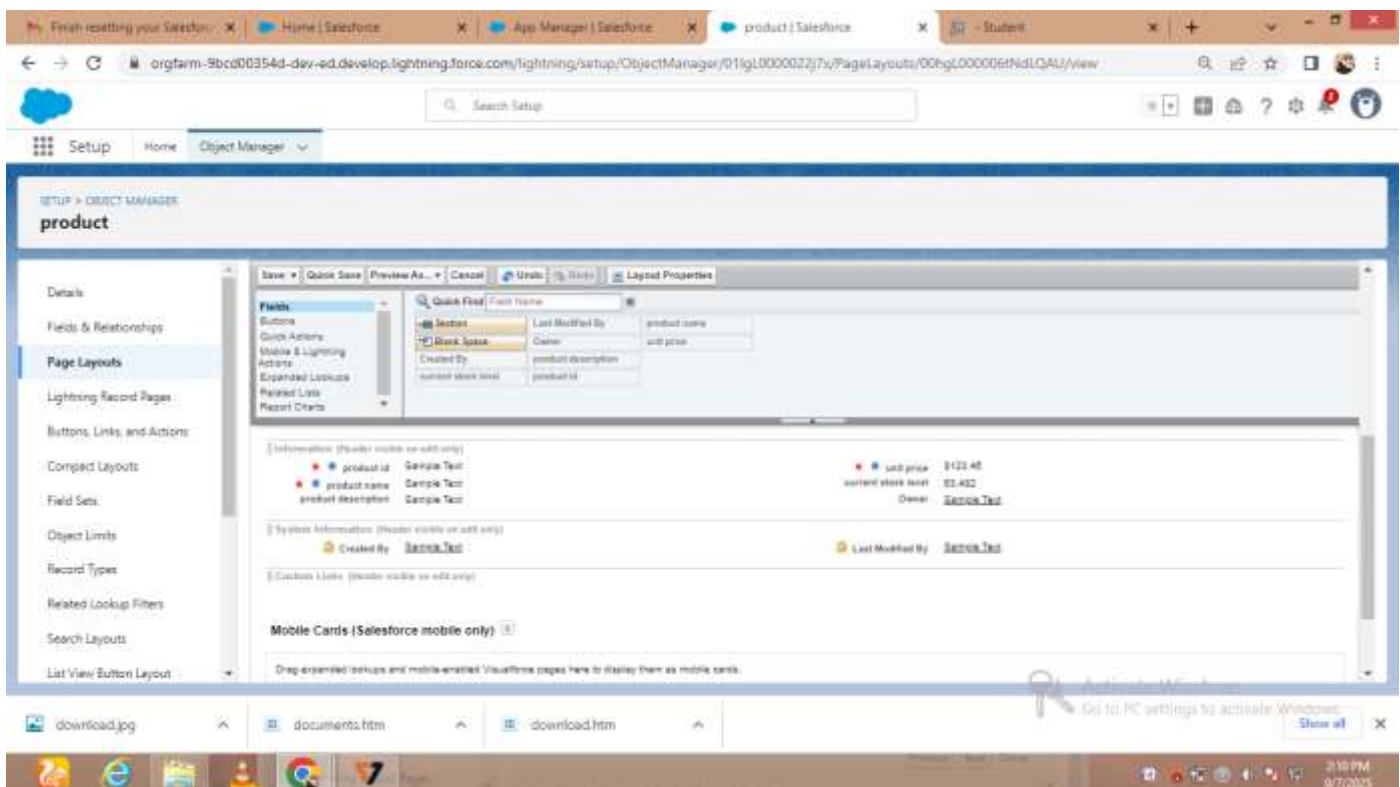
The screenshot shows the Salesforce Setup interface for the 'supplier' object. The left sidebar contains a navigation menu with options like Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, and List View Button Layout. The main content area is titled 'New Custom Field' and is at 'Step 4 of 4: Add to page layouts'. It displays the following field details:

Field Label	phone number
Data Type <td>Phone</td>	Phone
Field Name <td>phone_number</td>	phone_number
Description <td></td>	

Below the details, there is a section for selecting page layouts. It states: 'Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout. To change the location of this field on the page, you will need to customize the page layout.' There is a checkbox labeled 'Add Field' and a text input for 'Page Layout Name'. The 'Add Field' checkbox is checked, and the 'Page Layout Name' is 'supplier Layout'. At the bottom, there are buttons for 'Previous', 'Save & New', 'Save', and 'Cancel'. A watermark 'Arshad Wani' is visible in the bottom right corner.



- Creating a customer product



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orgfarm-9bcd00354d-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/011gl000000228J/Pagelayouts/06hgL0000006UgRQAU/view

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER

purchase order

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Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

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

Fields

Quick Find

Fields

enter count

enter date

purchase order id

supplier

purchase order Detail

Standard Buttons

Edit Delete Clone Change Owner Change Record Type Printable View Add Labels

Custom Buttons

Information (Viewer visible on edit only)

purchase order id **Service Text** enter count **Service Text**

Supplier order date 9/7/2025

System Information (Viewer visible on edit only)

Created By **Service Text** Last Modified By **Service Text**

Custom Links (Viewer visible on edit only)

Mobile Cards (Salesforce mobile only)

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Search Setup

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Details

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Search Layouts

List View Button Layout

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

Fields

Quick Find

Fields

enter count

enter date

purchase order id

supplier

purchase order Detail

Standard Buttons

Edit Delete Clone Change Owner Change Record Type Printable View Add Labels

Custom Buttons

Information (Viewer visible on edit only)

purchase order id **Service Text** enter count **Service Text**

Supplier order date 9/7/2025

System Information (Viewer visible on edit only)

Created By **Service Text** Last Modified By **Service Text**

Custom Links (Viewer visible on edit only)

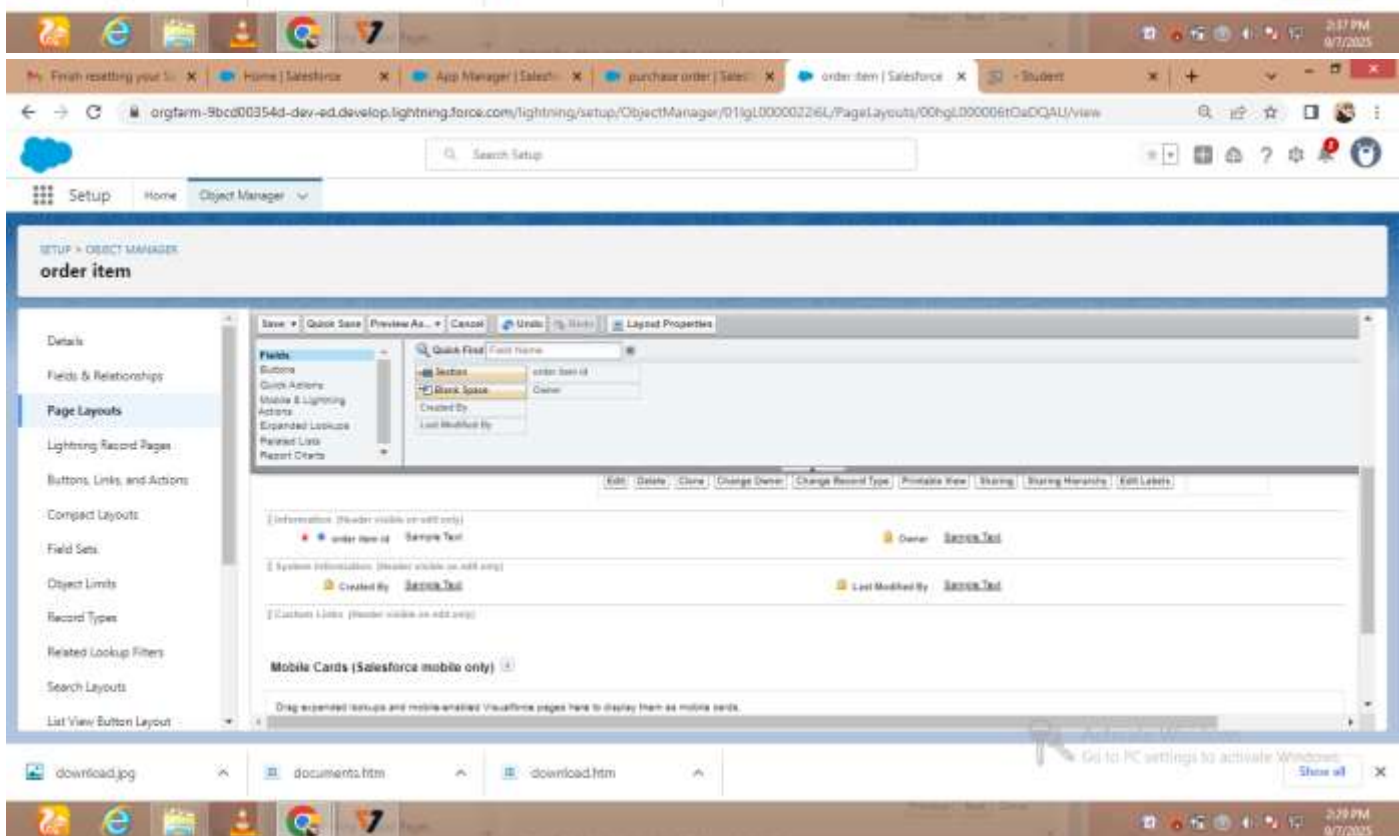
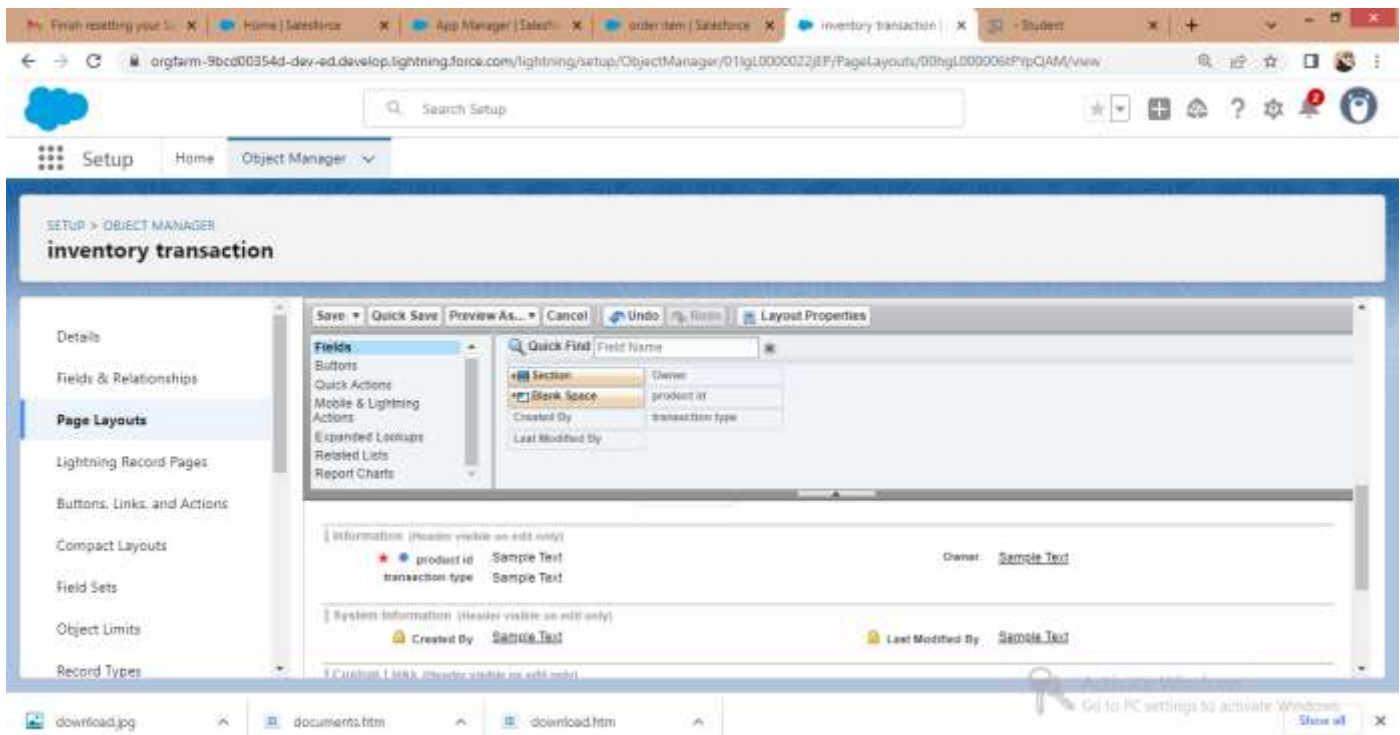
Mobile Cards (Salesforce mobile only)

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- Creating order item and transaction



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Setup Home Object Manager

inventory transaction

Details
Fields & Relationships
Page Layouts
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Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types

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

Fields

Quick Find	Field Name
Section	Owner
Blank Space	product id
Created By	transaction type
Last Modified By	

Information (Header visible on edit only)

product id	Sample Text	Owner	Sample Text
transaction type	Sample Text		

System Information (Header visible on edit only)

Created By	Sample Text	Last Modified By	Sample Text
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Custom Links (Header visible on edit only)

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orgfarm-9bcd00354d-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgL0000022jW9/PageLayouts/00hgl000006PpQAE/view

Setup Home Object Manager

supplier

Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types

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

Fields

Quick Find	Field Name
Section	Last Modified By
Blank Space	Owner
Created By	phone number
email	supplier Name

Information (Header visible on edit only)

supplier Name	Sample Text	phone number	1-415-555-1212
		email	sarah.sample@company.com
		Owner	Sample Text

System Information (Header visible on edit only)

Created By	Sample Text	Last Modified By	Sample Text
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Custom Links (Header visible on edit only)

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- Creating compact layouts

The image consists of two screenshots of the Salesforce Setup interface, specifically the Object Manager section.

The top screenshot shows the 'Compact Layout Assignment' page for the 'product' object. The left sidebar lists navigation options: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts (selected), Field Sets, Object Limits, and Record Types. The main content area is titled 'product Compact Layouts' and 'Compact Layout Assignment'. It features a 'Primary Compact Layout' section with a dropdown menu set to 'product compact layout'. There are 'Save' and 'Cancel' buttons at the top and bottom of this section. A 'Help for this Page' link is visible in the top right corner.

The bottom screenshot shows the 'Error Message' configuration page for the 'purchase order' object. The left sidebar is similar to the top screenshot, with 'Compact Layouts' selected. The main content area is titled 'purchase order' and 'Error Message'. It includes a 'Check Syntax' section with an error message: 'Error: Field Expected_Delivery_Date__c does not exist. Check spelling.' Below this is an 'Error Message' section with an example: 'Discount percent cannot exceed 30%'. It explains that the message will appear when the Error Condition formula is true. A text box contains the error message: 'The Expected Delivery Date should not exceed 7 days.' Below this, there is a section for 'Error Location' with radio buttons for 'Top of Page' (selected) and 'Field'. There are 'Save', 'Save & New', and 'Cancel' buttons at the bottom. A 'Help on this function' link is also present.

- Creating purchase order validation rule

The screenshot shows the Salesforce Setup interface for creating a new validation rule for the 'purchase order' object. The page title is 'purchase order Validation Rule'. The left sidebar contains navigation links: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, and Record Types. The main content area is titled 'Validation Rule Edit' and includes a 'Rule Name' field with the value 'Expected_Delivery_Date_Validation', an 'Active' checkbox that is checked, and a 'Description' field. Below these fields is the 'Error Condition Formula' section, which contains an example formula: `Discount_Percent__c > 0.30`. A 'Functions' dropdown menu is visible on the right side of the formula section. The bottom of the screen shows a Windows taskbar with various application icons and a system clock indicating 2:52 PM on 9/7/2025.

This screenshot shows the same Salesforce Setup page, but with the 'Error Condition Formula' field populated with the formula: `!(Expected_Delivery_Date__c - Order_Date__c) > 7`. The 'Functions' dropdown menu is open, displaying a list of functions including ABS, ACOS, ADDMONTHS, AND, ASCII, and ASIN. Below the formula field, there is a 'Check Syntax' button and an error message: 'Error: Field Expected_Delivery_Date__c does not exist. Check spelling.' The 'Error Message' field is also visible at the bottom of the form. The Windows taskbar at the bottom shows the same system clock and application icons as the previous screenshot.

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orgfarm-9bcd00354d-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/011gL000000228J/ValidationRules/new

Search Setup

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SETUP > OBJECT MANAGER

purchase order

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

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](#)

`Expected_Delivery_Date__c - Order_Date__c > 7`

[Check Syntax](#) Error: Field Expected_Delivery_Date__c does not exist. Check spelling.

[Help on this function](#)

Functions

All Function Categories

ABS
ACOS
ADDMONTHS
AND
ASCII
ASIN

[Insert Selected Function](#)

ABS(number)
Returns the absolute value of a number, a number without its sign

[Help on this function](#)

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Show all

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Finish resetting your S... X Home | Salesforce X App Manager | Sale... X product | Salesforce X purchase order | Sale... X Student X

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Search Setup

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purchase order

Details

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Compact Layouts

Field Sets

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Record Types

[Check Syntax](#) Error: Field Expected_Delivery_Date__c does not exist. Check spelling.

[Help on this function](#)

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`

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

[Save](#) [Save & New](#) [Cancel](#)

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Show all

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- Creating customer profiles

The screenshot shows the Salesforce Setup interface for the 'Profiles' page. The left sidebar contains a navigation menu with categories like Feature Settings, Data.com, Functions, Marketing, Sales, and Products. The main content area is titled 'Profiles' and includes sections for 'Data Share Targets', 'Data Share Target Connection', 'Custom Object Permissions', and 'Session Settings'. The 'Custom Object Permissions' section displays two tables: one for 'Inventory transactions' and one for 'purchase orders'. Each table has columns for 'Basic Access' (Read, Create, Edit, Delete) and 'Data Administration' (View All Records, Modify All Records, View All Fields). Checkmarks indicate which permissions are enabled for the profile.

Object	Basic Access				Data Administration		
	Read	Create	Edit	Delete	View All Records	Modify All Records	View All Fields
Inventory transactions	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
order items	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
products	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
purchase orders	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
suppliers	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

The screenshot shows the Salesforce Setup interface for the 'Profiles' page. The left sidebar contains a navigation menu with categories like Users, Profiles, and Roles. The main content area is titled 'Profiles' and displays a list of profiles. Each profile has columns for 'Standard' and 'Custom' permissions. Checkmarks indicate which permissions are enabled for the profile.

Profile Name	Standard	Custom
Automation (standard__FlowsApp)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Bolt Solutions (standard__LightningBolt)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Community (standard__Community)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Content (standard__Content)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Data Cloud (standard__Audience360)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Data Manager (standard__DataManager)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Digital Experiences (standard__SalesforceCMS)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Lightning Usage App (standard__LightningInstrumentation)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Marketing CRM Classic (standard__Marketing)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Medical Inventory Management (medical_inventory_management)	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Sales Cloud Mobile (standard__SalesCloudMobile)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Sales Console (standard__LightningSalesConsole)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Salesforce Chatter (standard__Chatter)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Salesforce Scheduler Setup (standard__LightningScheduler)	<input type="checkbox"/>	<input type="checkbox"/>
Sample Console (standard__ServiceConsole)	<input type="checkbox"/>	<input type="checkbox"/>
Service (standard__Service)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Service Console (standard__LightningService)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Site.com (standard__Sites)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Subscription Management (standard__RevenueCloudConsole)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
WDC (standard__Work)	<input checked="" type="checkbox"/>	<input type="checkbox"/>

- Creating customer reports

