

PROJECT TITEL: MEDICAL INVENTOTY MANAGEMENT SYSTEM

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College Code: bru4p

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Salesforce Project Documentation

Project Title:

Medical Inventory Management System

Project Description:

The Medical Inventory Management System is a comprehensive Salesforce application developed to efficiently manage various aspects of medical inventory operations. This system enables the effective maintenance of supplier details, purchase order management, product tracking, and expiry date monitoring. The solution enhances operational efficiency, ensures data accuracy, and provides powerful reporting capabilities to aid informed decision-making within medical inventory management.

Project Objectives:

- Streamline medical inventory operations using Salesforce
- Maintain detailed supplier information including contact details
- Catalog product information such as descriptions and stock levels
- Track product expiry dates to avoid using expired items
- Generate comprehensive reports for supplier performance and purchase orders

Project Features:

- Supplier Management
- Product Management with Stock & Expiry Tracking
- Purchase Order Management
- Expiry Date Alerts
- Comprehensive Reporting
- Role-based Access Control
- User Management
- Automation with Flows and Triggers
- Validation Rules for Data Accuracy

Project Flow & Milestones:

Milestone 1 - Salesforce Account

Created a Salesforce Developer Account to access and build the application. Understood Salesforce as a customer success platform designed to help sell, service, market, and manage operations efficiently.

Build enterprise-quality apps fast and get hands-on with Agentforce and Data Cloud.

Sign up for your Developer Edition.

- ✓ 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
- ✓ Integrate with anything using APIs

Sign up for your Developer Edition
A free Salesforce Platform environment with Agentforce and Data Cloud

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Job title: Developer ✓ Work email: dhivya.cs23@kasc ✓

Company: Kamadhenu arts ✓ Country/Region: India ✓

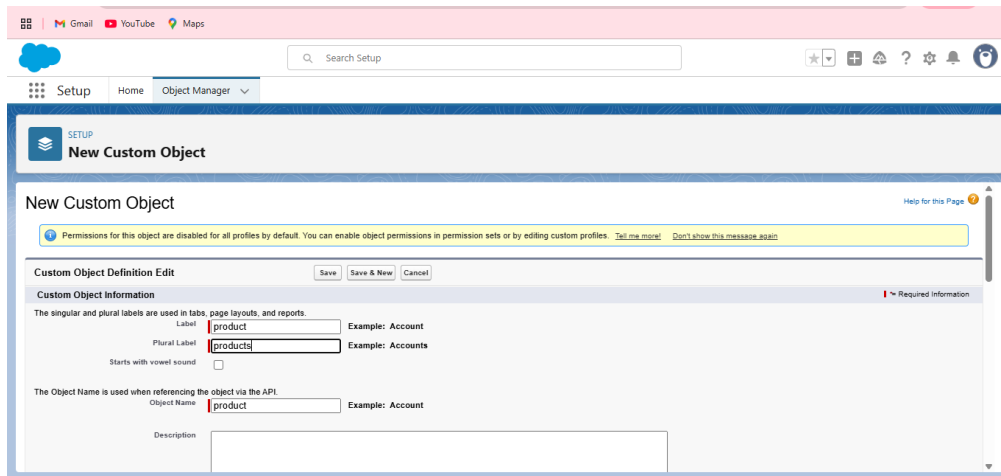
☒ I agree to the Main Services Agreement - Developer Services and Salesforce Program Agreement. I acknowledge, as described in the Developer Documentation: (1) the Developer Edition includes autonomous and other generative AI features; and (2) Salesforce may limit use of those features and the org, and may terminate any org that has been inactive for 45 days.

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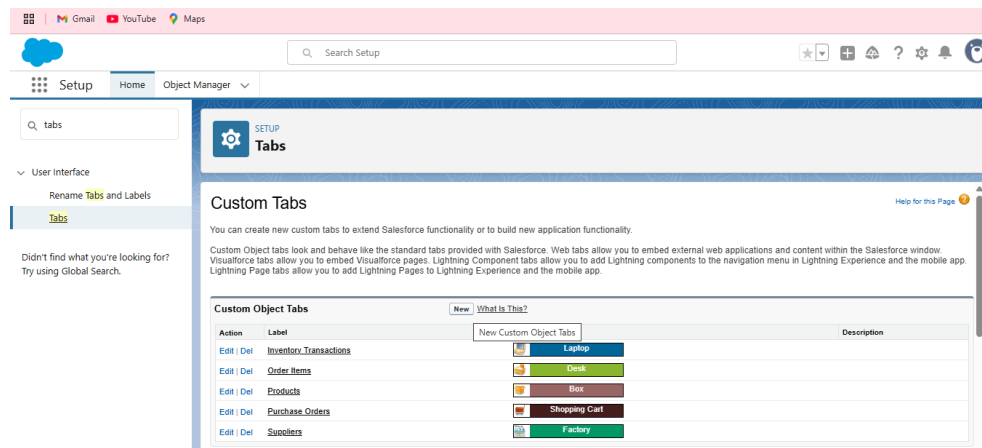
Milestone 2 - Objects

Created custom objects such as Product, Purchase Order, Supplier, Order Item, and Inventory Transaction to store relevant data for managing medical inventory.



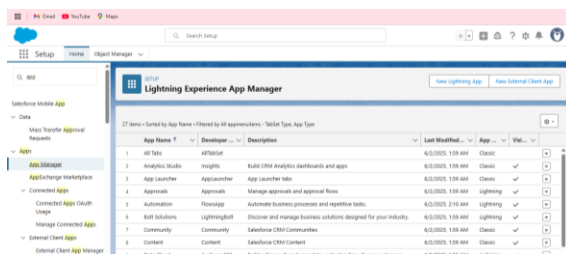
Milestone 3 - Tabs

Added custom tabs for easy access to objects like Product, Supplier, Purchase Orders, etc., ensuring smooth navigation for users.



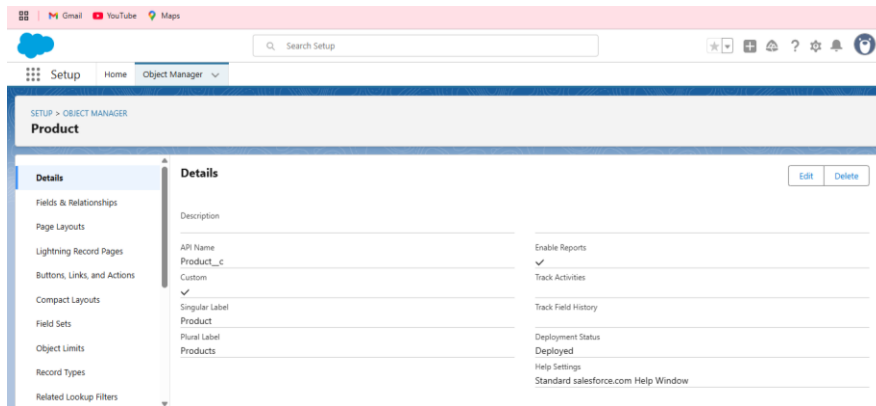
Milestone 4 - The Lightning App

Developed a custom Lightning App, combining objects, tabs, and tools to deliver an intuitive, efficient user experience tailored for medical inventory management.



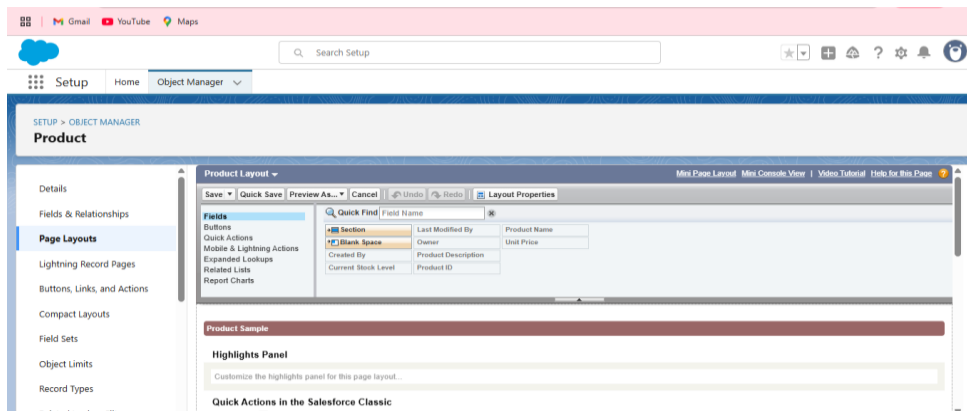
Milestone 5 - Fields

Created necessary fields for each object, including product details, stock levels, expiry dates, order details, supplier information, and transaction details to capture all required data.



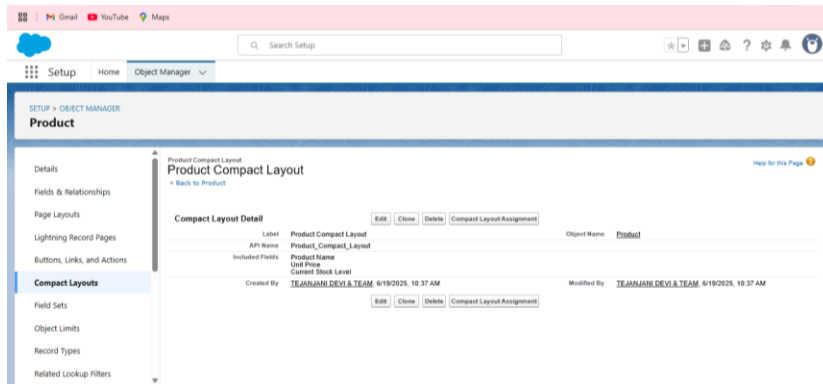
Milestone 6 - Editing of Page Layouts

Customized page layouts for objects to control field visibility, structure, and grouping, ensuring users have access to relevant information in an organized manner.



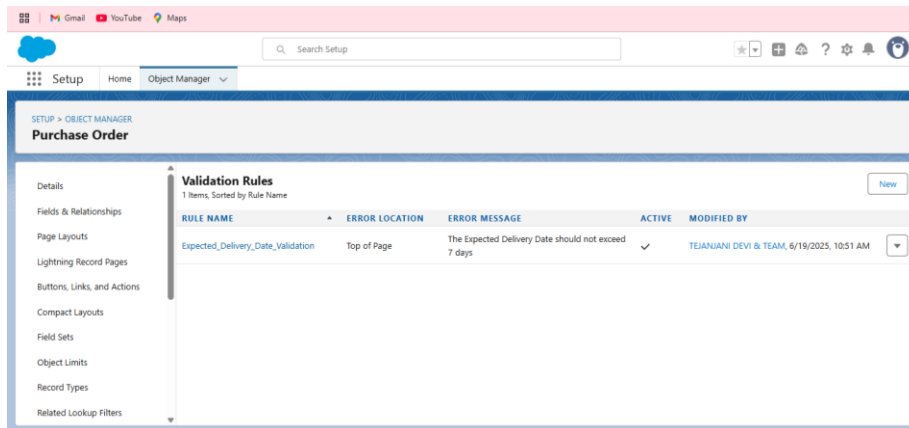
Milestone 7 - Compact Layouts

Designed compact layouts to display key fields at a glance, allowing users to quickly access essential information without opening full records.



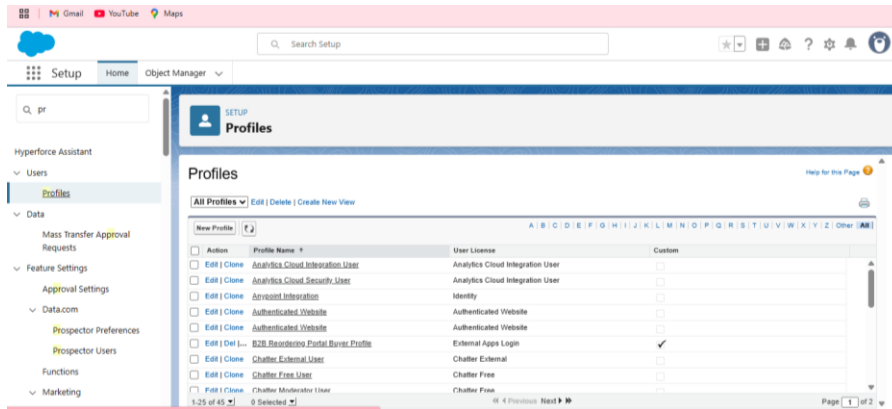
Milestone 8 - Validation Rules

Implemented validation rules to ensure data accuracy and integrity by preventing users from saving incomplete or incorrect records.



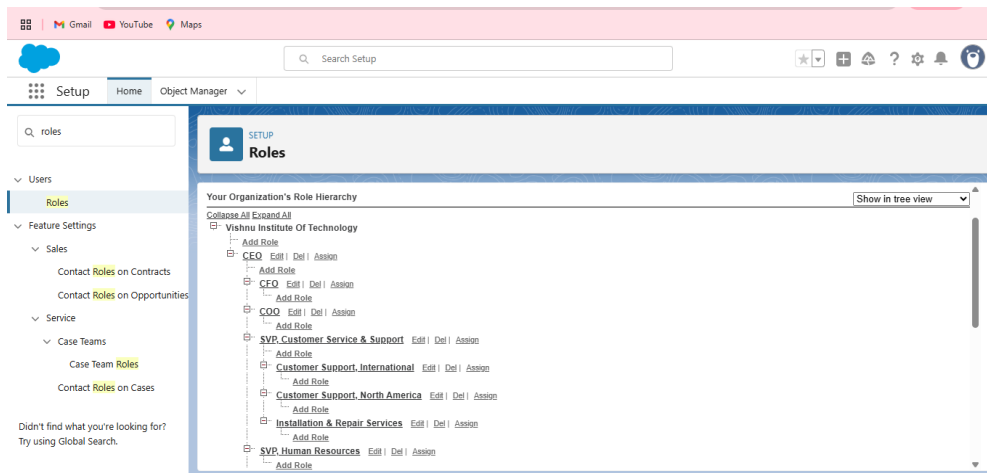
Milestone 9 - Profiles

Configured profiles to define user permissions, controlling what users can view, edit, create, or delete across different objects and features.



Milestone 10 - Roles

Defined a role hierarchy to control record-level access and ensure appropriate data visibility across different levels of the organization.



Milestone 11 - Users

Created user accounts, assigned appropriate profiles and roles to ensure secured access to the system based on their responsibilities.

Users

All Users

On this page you can create, view, and manage users.

To get more licenses, use the Your Account app. [Let's Go](#)

View: **All Users** [Edit](#) [Create New View](#)

[New User](#) [Reset Password\(s\)](#) [Add Multiple Users](#)

Action	Full Name ↑	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	& TEAM TEJANJANI DEVI	22e	22ea1a4562599@agentforce.com		✓	System Administrator
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chatterv00d9i000004o3buay.zvxsbbcehws@chatter.salesforce.com		✓	Chatter Free User
<input type="checkbox"/> Edit	EPIC_QrgFarm	OEPIG	epic.cada996dfe2@orgfarm.com		✓	System Administrator
<input type="checkbox"/> Edit	Krishna Ram	krira	krishnanidevi@gmail.com	Inventory Manager	✓	Inventory Manager
<input type="checkbox"/> Edit	PurchaseM John	jouch	23ea5a52525@vishnu.edu.in	Purchasing Manager	✓	Purchase Manager
<input type="checkbox"/> Edit	User Integration	integ	integration@00d9i000004p5buay.com		✓	Analytics Cloud Integration User

Milestone 12 - Permission Sets

Used permission sets to extend specific user permissions beyond their profiles without affecting overall system security or creating extra profiles.

Permission Sets

Permission Sets

On this page you can create, view, and manage permission sets.

[All Permission Sets](#) [Edit](#) [Delete](#) [Create New View](#)

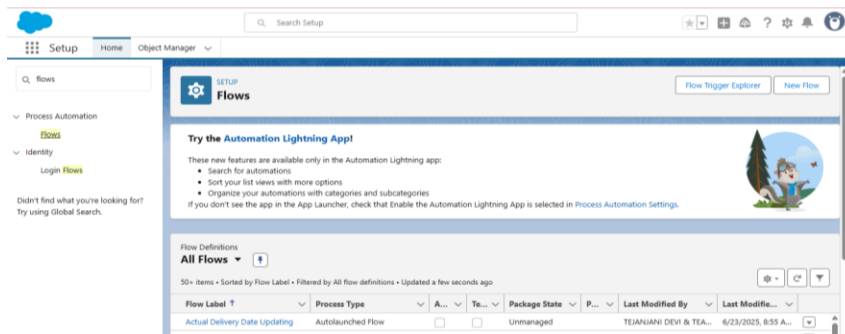
[New](#) [f2](#)

Action	Permission Set Name	Description	License
<input type="checkbox"/> Clone	(Legacy) Data Cloud	This Data Cloud p...	Customer Data PI...
<input type="checkbox"/> Clone	(Legacy) Data Cloud	This Data Cloud p...	Customer Data PI...
<input type="checkbox"/> Clone	(Legacy) Data Cloud	This Data Cloud p...	Customer Data Plat...
<input type="checkbox"/> Clone	(Legacy) Data Cloud	This Data Cloud per...	Data Cloud
<input type="checkbox"/> Clone	(Legacy) Data Cloud	This Data Cloud per...	Customer Data Clou...
<input type="checkbox"/> Clone	(Legacy) Data Cloud	This Data Cloud per...	Customer Data Clou...
<input type="checkbox"/> Clone	(Legacy) Data Cloud	This Data Cloud per...	Customer Data Clou...
<input type="checkbox"/> Clone	Access Agentforce D...	Gives users access t...	Agentforce (Default)

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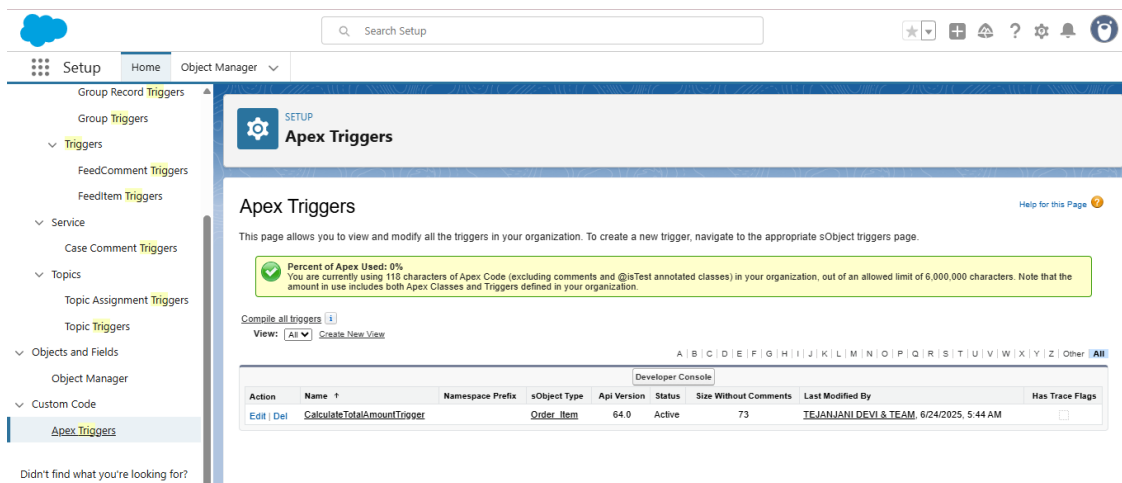
Milestone 13 - Flows

Built flows to automate business processes such as product expiry alerts, purchase order approvals, and supplier notifications without writing code.



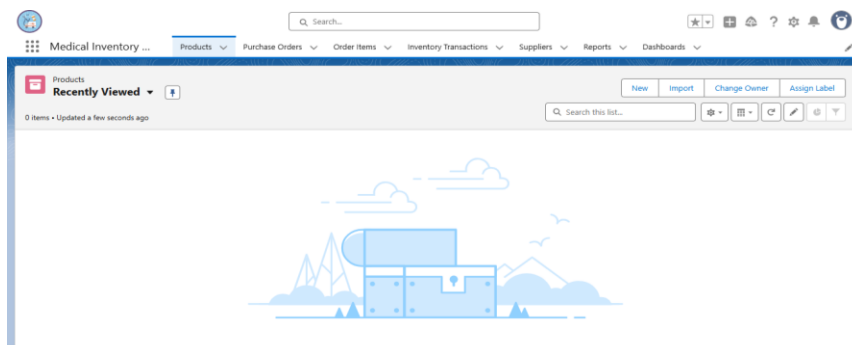
Milestone 14 - Triggers

Developed Apex triggers to handle complex business logic, such as automatic updates of stock levels and calculations that cannot be achieved through point-and-click tools.



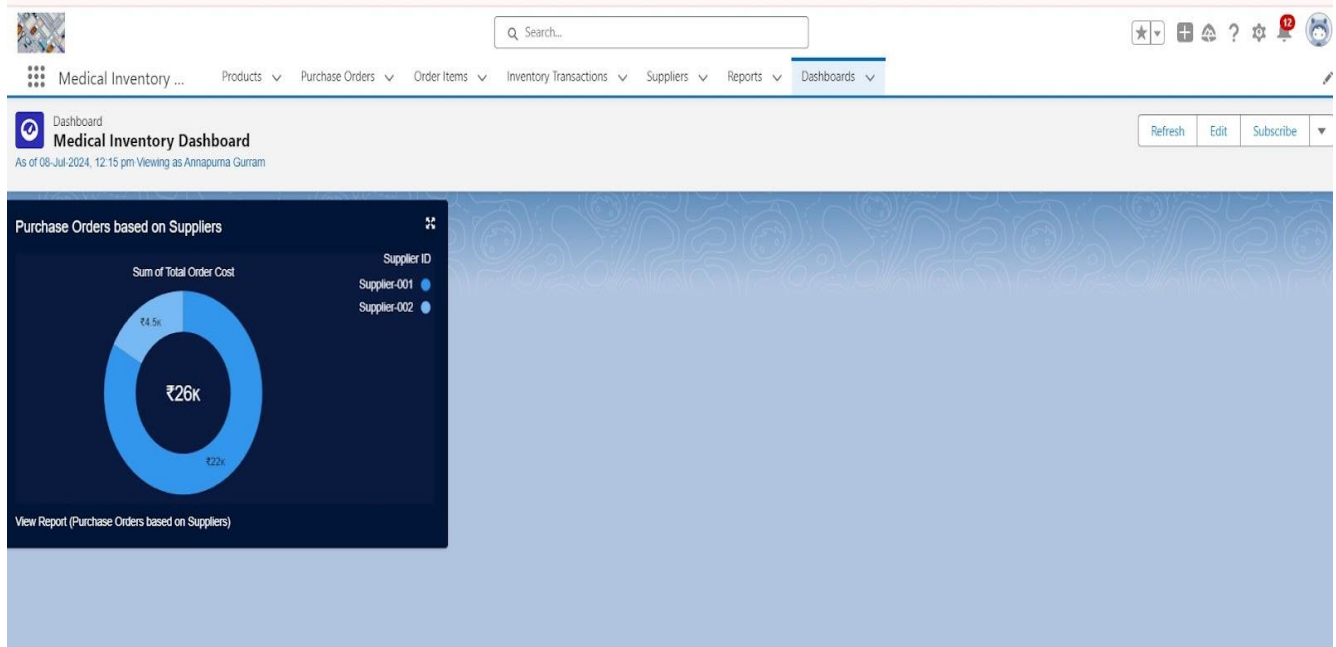
Milestone 15 - Reports

Generated reports for supplier performance, stock levels, order summaries, and expiry tracking to gain actionable insights and support decision-making.



Milestone 16 - Dashboards

Designed dynamic dashboards to visually represent key inventory metrics, supplier performance, and order summaries for quick, real-time monitoring.



Technologies & Tools Used:

- Salesforce Lightning Platform
- Apex (for Triggers)
- Flows (Automation)
- Validation Rules
- Reports & Dashboards
- Profiles, Roles, Permission Sets

Learning Outcomes:

- Hands-on experience with a real-time Salesforce project
- Strong understanding of object relationships and data modelling in Salesforce
- Proficiency in Page Layout customization and Compact Layouts

- Knowledge of data validation techniques using Validation Rules
- Efficient management of user access through Profiles, Roles, and Permission Sets
- Automation of processes using Flows and Apex Triggers
- Ability to create insightful Reports and Dashboards for performance tracking

Conclusion:

The Medical Inventory Management System developed on Salesforce offers a centralized, efficient, and reliable solution for managing medical inventory. Through its robust features, automation capabilities, and user-friendly interface, the system enhances operational efficiency, ensures product tracking, and supports informed decision-making with real-time insights.