

# MEDICAL INVENTORY MANAGEMENT

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**COLLEGE CODE :** burbd

**TEAM ID :** NM2025TMID21090

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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 a web browser window with the URL `salesforce.com/form/developer-signup?id=pb`. 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 five 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", and "Ground Agentforce with structured and unstructured data". At the bottom of the header is a "Steps" section with "Select Type" highlighted.

The main content area is a white box titled "Sign up for your Developer Edition" with the subtitle "A free Salesforce Platform environment with Agentforce and Data Cloud". It contains a sign-up form with the following fields:

First name	Last name
dharanishwarl	Jayavel

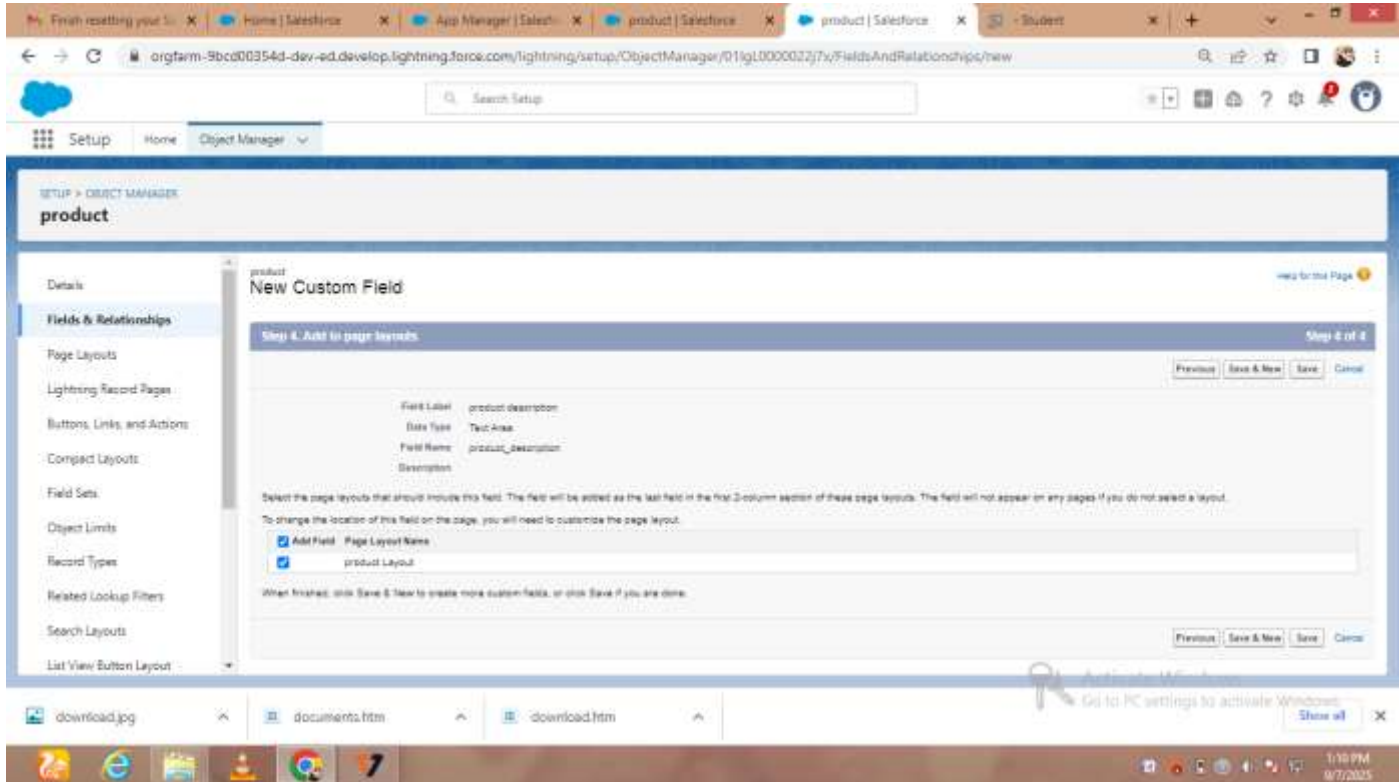
Job title	Work email
developer	dharanishwarl15@gmail

Company	Country/Region
SVASC	India

Below the form, it states: "Your org may be provisioned on or migrated to Hyperforce, Salesforce's public cloud infrastructure." There is a checkbox labeled "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." which is checked.

The Windows taskbar at the bottom shows the search bar with "Type here to search", the task view button, and several open applications including Google Chrome. The system tray on the right shows the date and time as "18:18 06-09-2025".

- Creating a product object.



Finish resetting your S... Home | Salesforce App Manager | Salesforce | Object Manager | Salesforce product | Salesforce Student

orgfarm-9bcd00354d-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgL000002j7x/FieldsAndRelationships/new

Search Setup

Setup Home 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 of 4

Step 4. Add to page layouts.

Previous Save & New Save Cancel

Field Label	current stock level
Data Type	Number
Field Name	current_stock_level
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

download.jpg documents.htm download.htm

Go to PC settings to activate Windows

Show all

1:14 PM 9/7/2025

Finish resetting your S... Home | Salesforce App Manager | Salesforce | product | Salesforce product | Salesforce Student

orgfarm-9bcd00354d-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgL000002j7x/FieldsAndRelationships/new

Search Setup

Setup Home 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 of 4

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.

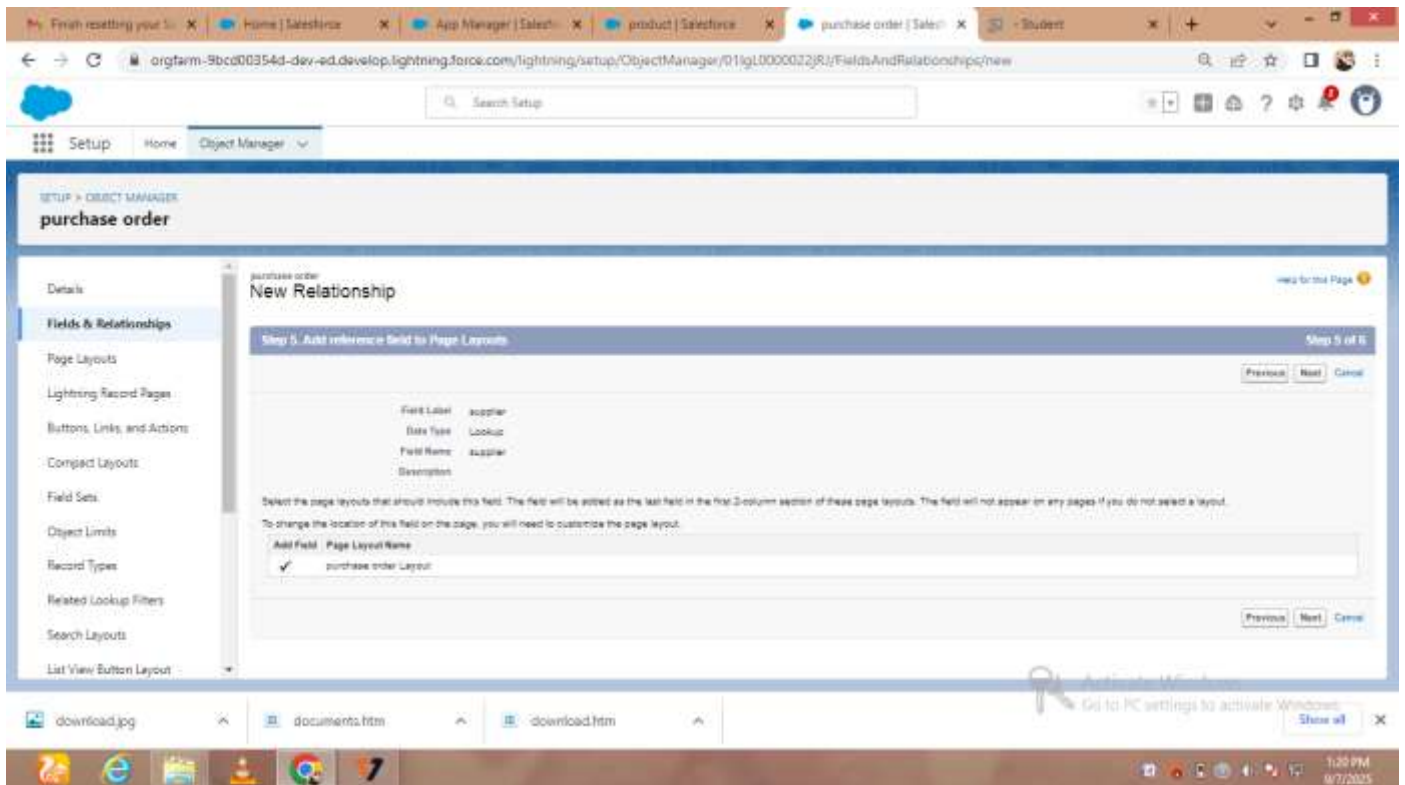
Previous Save & New Save Cancel

download.jpg documents.htm download.htm

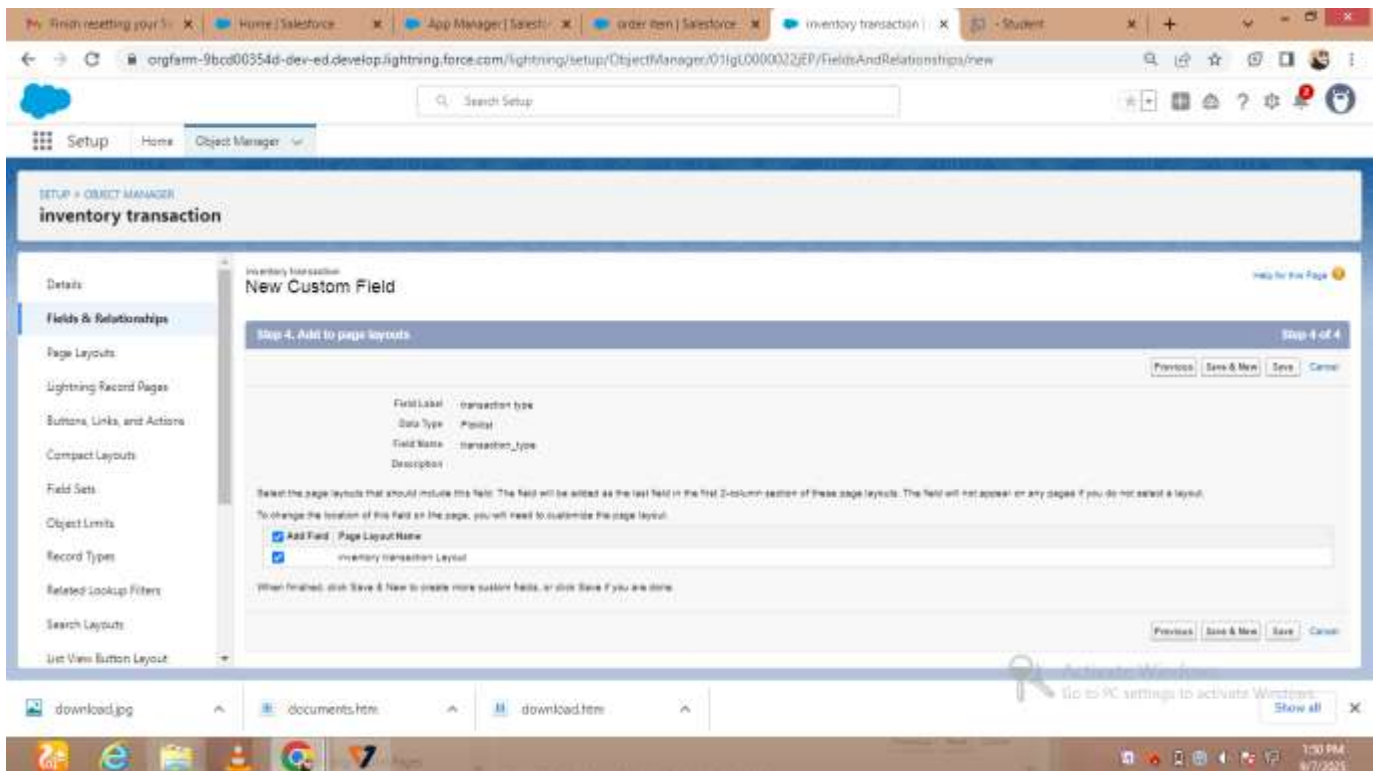
Go to PC settings to activate Windows

Show all

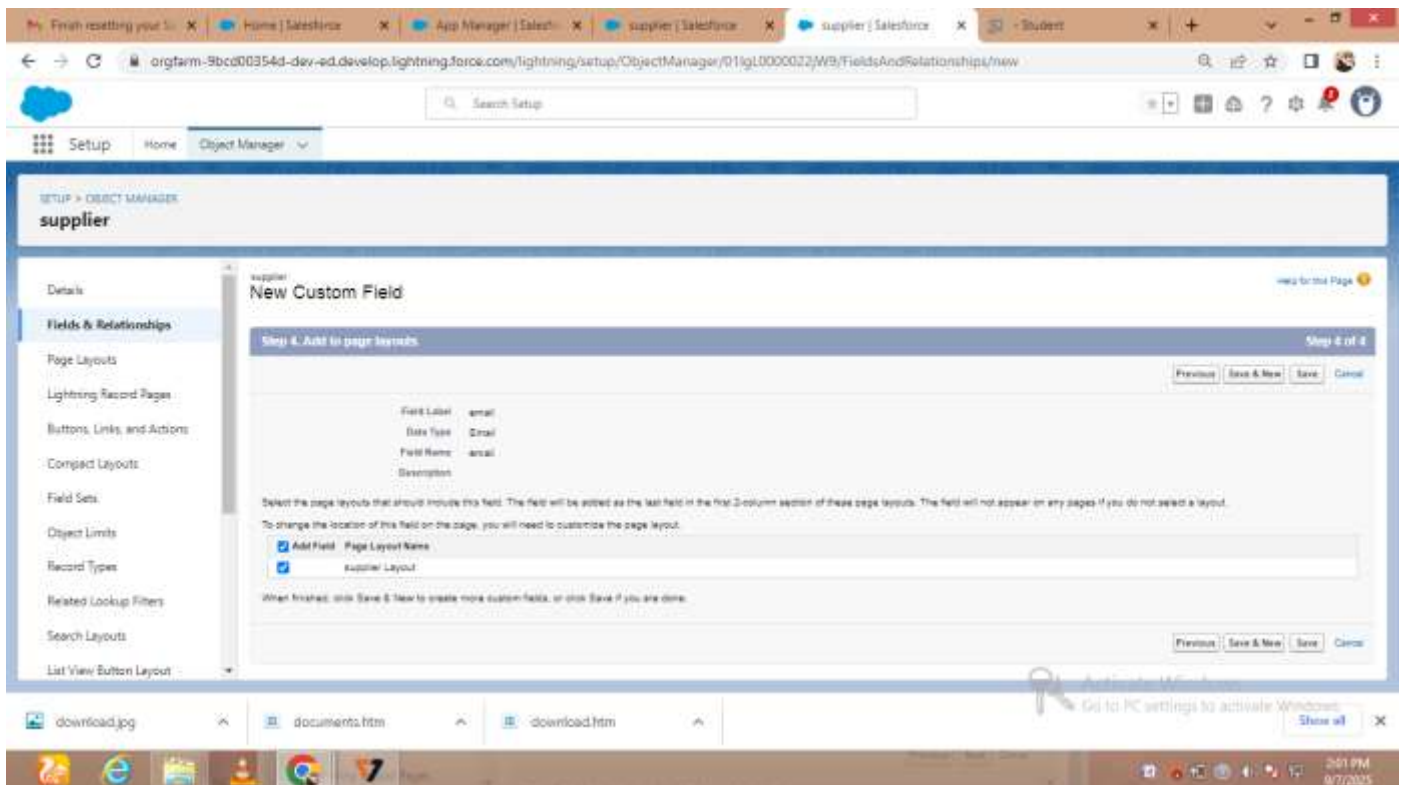
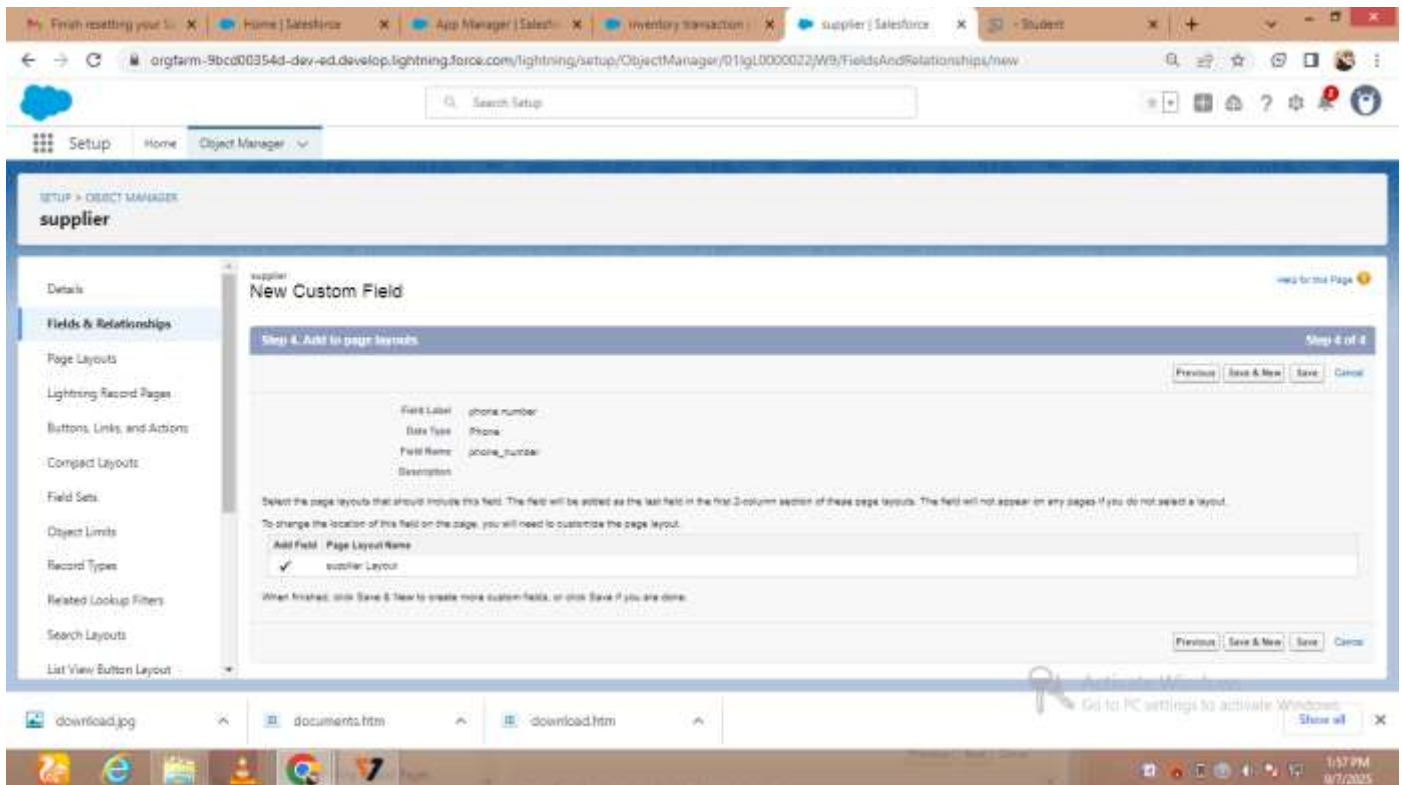
1:17 PM 9/7/2025



- Creating new Custom field id







- Creating a customer product

Finish resetting your Salesforce | Home | Salesforce | App Manager | Salesforce | product | Salesforce | Student

orgfarm-9bcd00354d-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgL0000002j7x/PageLayouts/00hgL0000006fNdLQAU/view

Search Setup

Setup Home 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

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

Fields

Quick Find

Fields

product name

product description

product id

product code

unit price

Current stock level

Last Modified By

Owner

Created By

Information (Header visible on edit only)

product id

product name

product description

Sample Text

Sample Text

Sample Text

System Information (Header visible on edit only)

Created By

Last Modified By

Custom Links (Header visible on edit only)

Mobile Cards (Salesforce mobile only)

Drag expanded desktop and mobile-enabled Visualforce pages here to display them as mobile cards.

download.jpg documents.htm download.htm

Go to PC settings to activate Windows

Show all

2:10 PM 9/7/2025

Finish resetting your Salesforce | Home | Salesforce | App Manager | Salesforce | product | Salesforce | purchase order | Salesforce | Student

orgfarm-9bcd00354d-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgL0000002j8j/PageLayouts/00hgL0000006fUgRQAU/view

Search Setup

Setup Home Object Manager

### purchase order

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

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

Fields

Quick Find

Fields

purchase order id

supplier

order date

order count

order date

purchase order id

supplier

Last Modified By

Standard Buttons

Edit Delete Clone Change Owner Change Record Type Printable View Edit Layouts

Custom Buttons

Information (Header visible on edit only)

purchase order id

supplier

order date

order count

Sample Text

Sample Text

Sample Text

System Information (Header visible on edit only)

Created By

Last Modified By

Custom Links (Header visible on edit only)

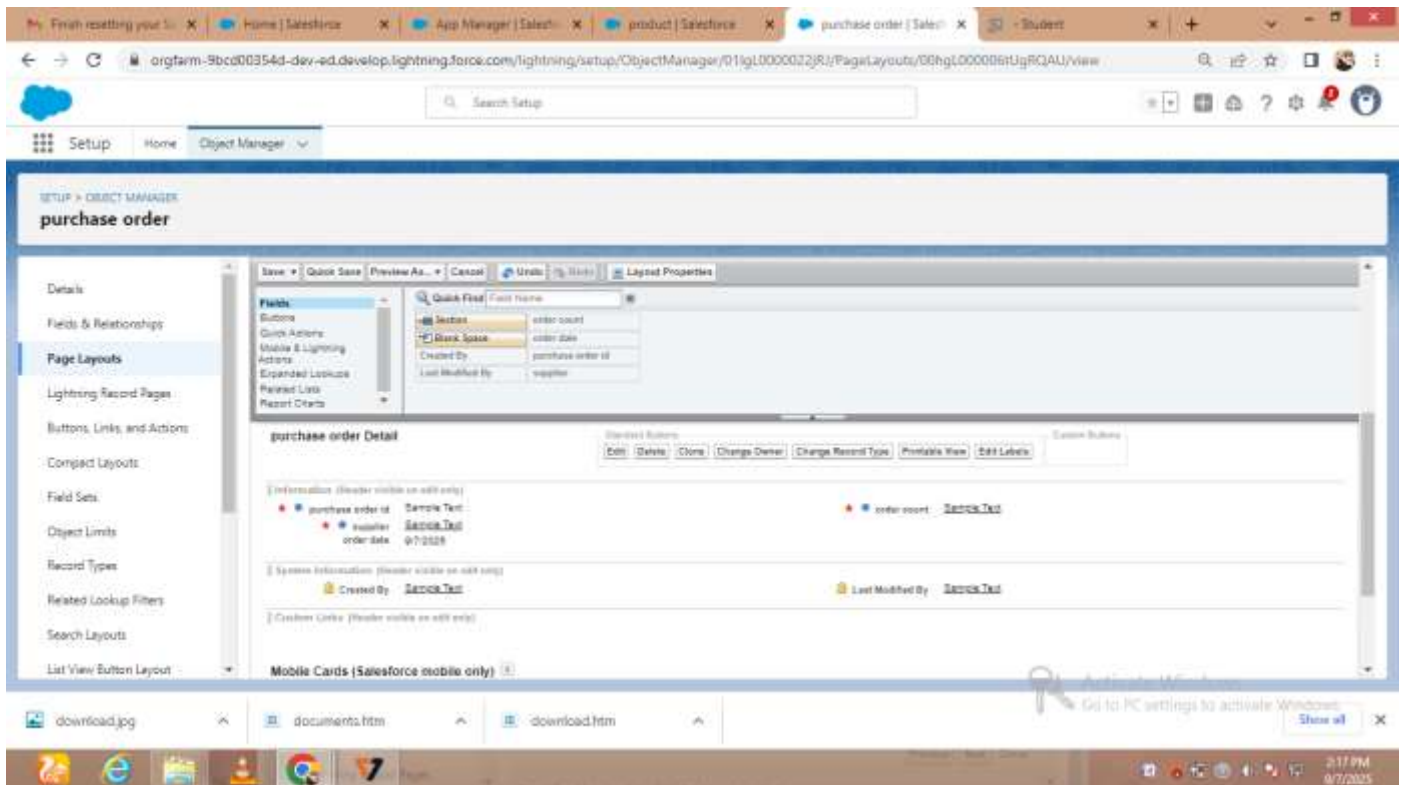
Mobile Cards (Salesforce mobile only)

purchase order Detail

Go to PC settings to activate Windows

Show all

2:17 PM 9/7/2025



- Creating order item and transaction



Final resetting your S... X Home | Salesforce X App Manager | Salesforce X order item | Salesforce X inventory transaction X Student X

orgfarm-9bcd00354d-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgL0000022j8F/PageLayouts/00hgl0000006PtpQAM/view

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER

### inventory transaction

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

Buttons

Quick Actions

Mobile & Lightning Actions

Expanded Lookups

Related Lists

Report Charts

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

Custom Links (Header visible on edit only)

Go to PC settings to activate Windows

Show all

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2:37 PM 9/7/2025

Final resetting your S... X Home | Salesforce X App Manager | Salesforce X purchase order | Salesforce X order item | Salesforce X Student X

orgfarm-9bcd00354d-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgL0000022j8L/PageLayouts/00hgl0000006tDaQAU/view

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER

### order item

Details

Fields & Relationships

**Page Layouts**

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

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 enter item id

Blank Space Owner

Created By

Last Modified By

Edit Delete Clone Change Owner Change Record Type Printable View Sharing Sharing Metadata Edit Labels

Information (Header visible on edit only)

order item id Sample Text Owner Sample Text

System Information (Header visible on edit only)

Created By Sample Text

Last Modified By Sample Text

Custom Links (Header visible on edit only)

Mobile Cards (Salesforce mobile only)

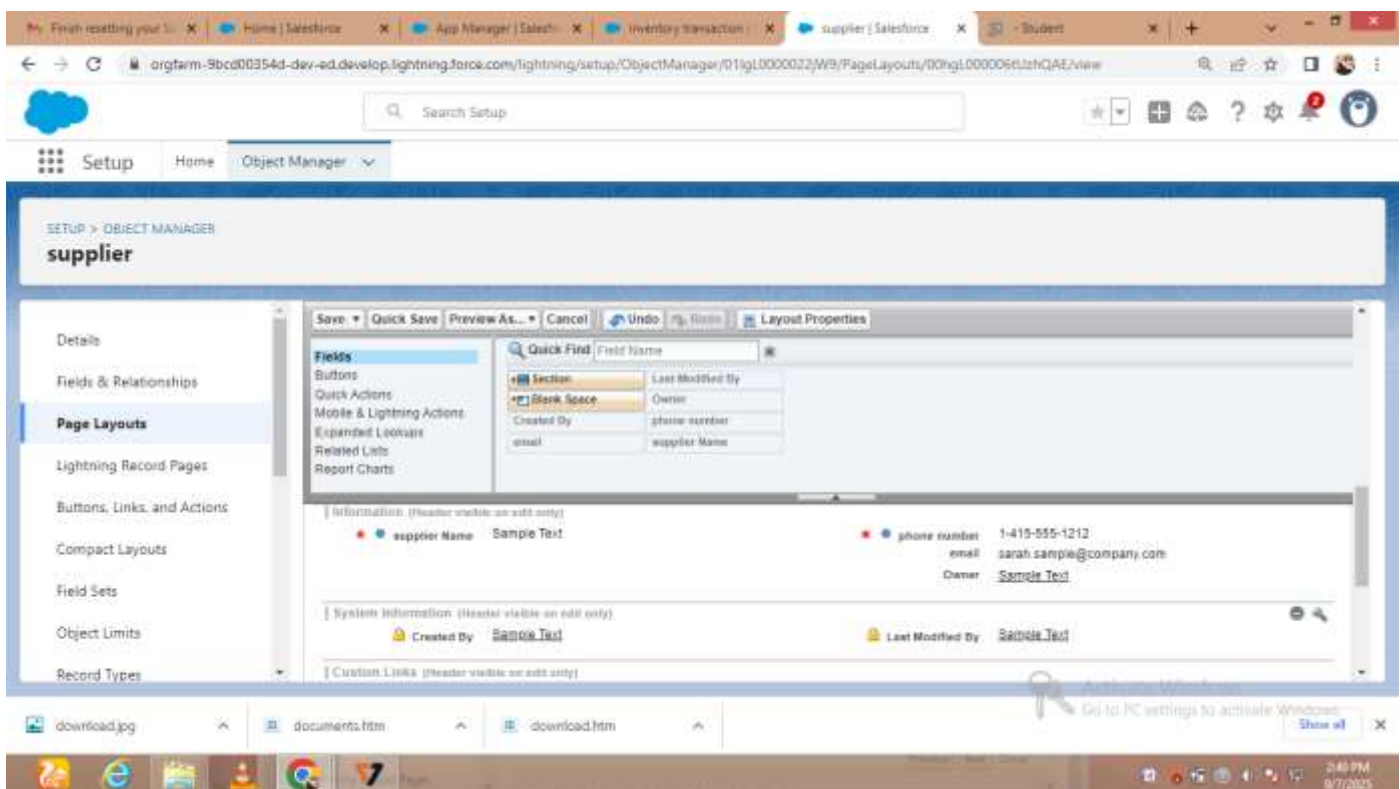
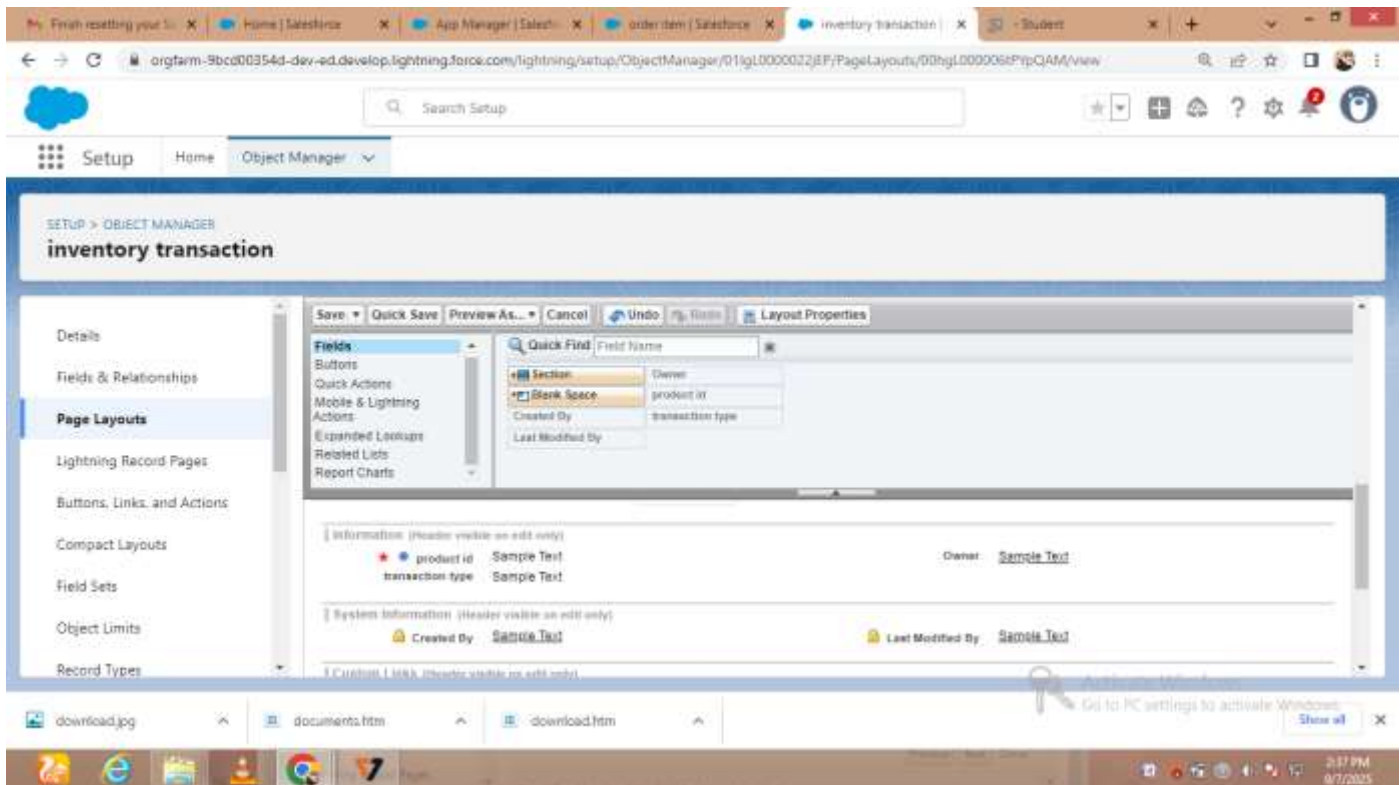
Drag expanded setups and mobile-enabled Visualforce pages here to display them as mobile cards.

Go to PC settings to activate Windows

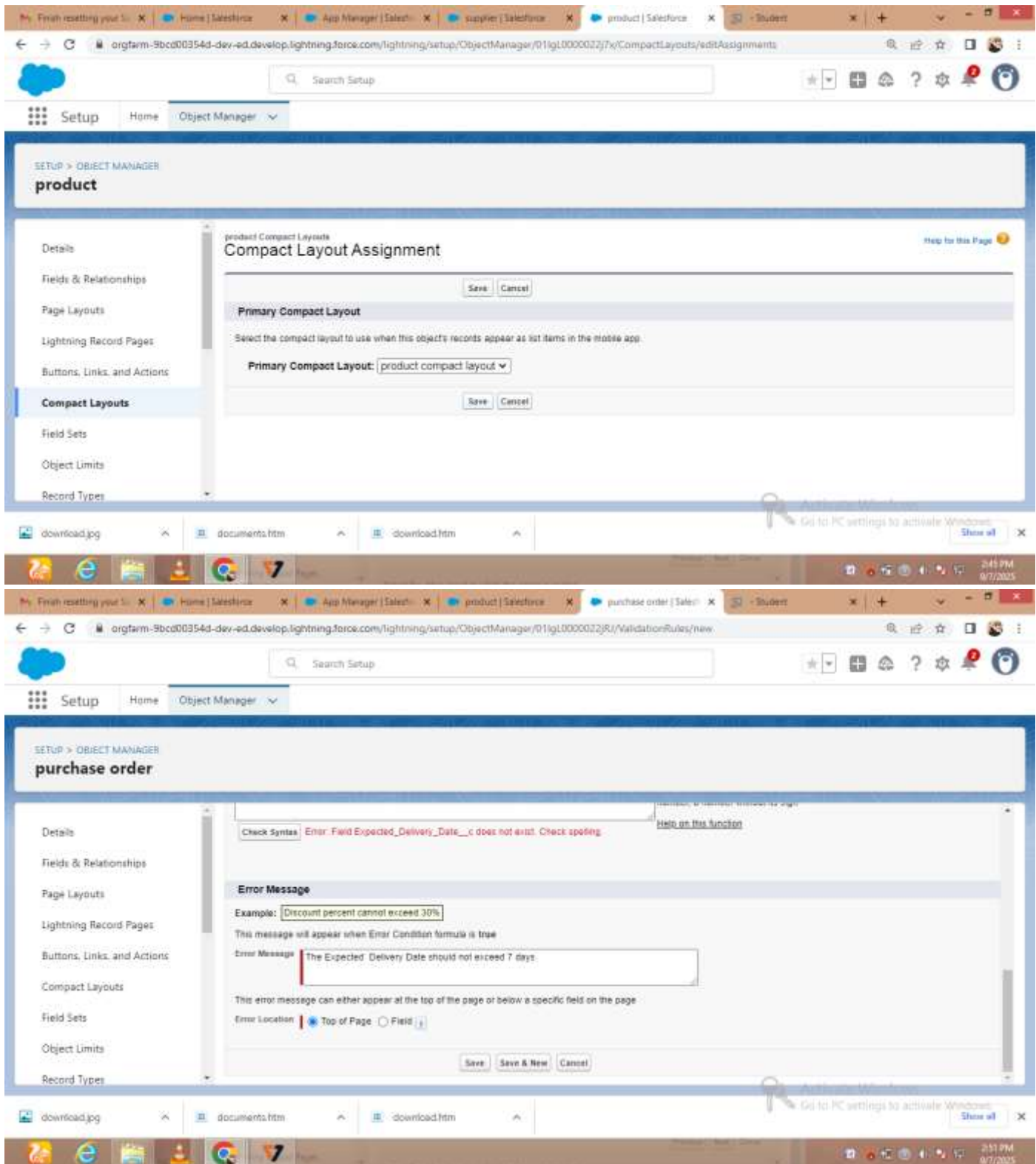
Show all

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- Creating compact layouts



- Creating purchase order validation rule

orgfarm-9bcd00354d-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgL0000022jRj/ValidationRules/new

Setup Home Object Manager

purchase order

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

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

Active ☒

Description

Quick Tips

- Operators & Functions

Error Condition Formula

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

Display an error if Discount is more than 30%

Functions

— All Function Categories —

Go to PC settings to activate Windows

Show all

orgfarm-9bcd00354d-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgL0000022jRj/ValidationRules/new

Setup Home 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

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

Error Message

Go to PC settings to activate Windows

Show all



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

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

Search Setup

Setup Home Object Manager

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

Go to PC settings to activate Windows

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2:52 PM 9/7/2025

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

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

Search Setup

Setup Home Object Manager

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

[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](#)

Go to PC settings to activate Windows

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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	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

