

MEDICAL INVENTORY MANAGEMENT

TEAM ID : NM2025TMID26963

TEAM MEMBERS :

Team Leader Name : L.DHARSHANA

Email : lakshmanasamydharshana@gmail.com

Team member 1 : M.SATHYA

Email : sathyasathya17579@gmail.com

1.INTRODUCTION

1.1 Project Overview

The **Medical Inventory Management System** is a Salesforce-based application designed to streamline and manage various operational aspects of medical inventory. The system enables organizations to efficiently maintain supplier details, manage purchase orders, track product details and transactions, and monitor product expiry.

Supplier management

- Add supplier
- Maintain records

Product management

- Add product
- Track stock
- Monitor expiry

Purchase orders

- Create purchase orders
- Approval process
- Update status

Transactions

- Purchase entry
- Issue entry
- Auto update stock

Automation

- Flows
- Validation rules
- Triggers
- Scheduler

Reports&Alerts

- Email alerts
- inventory report
- supplier report

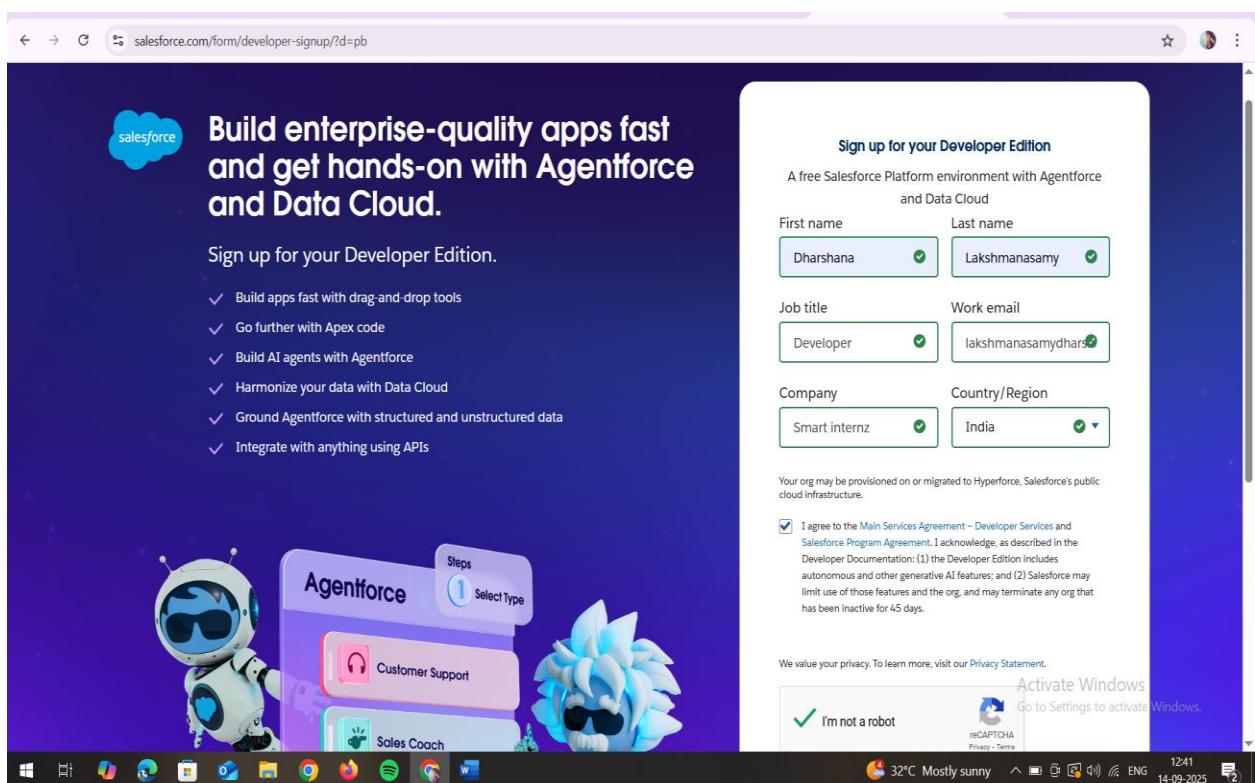
1.2 Purpose

The purpose of the **Medical Inventory Management System** is to streamline the management of suppliers, products, and purchase orders in a centralized platform. It helps track stock levels, monitor expiry dates, and automate alerts to ensure accuracy and efficiency. This reduces manual effort and improves decision-making for medical organizations.

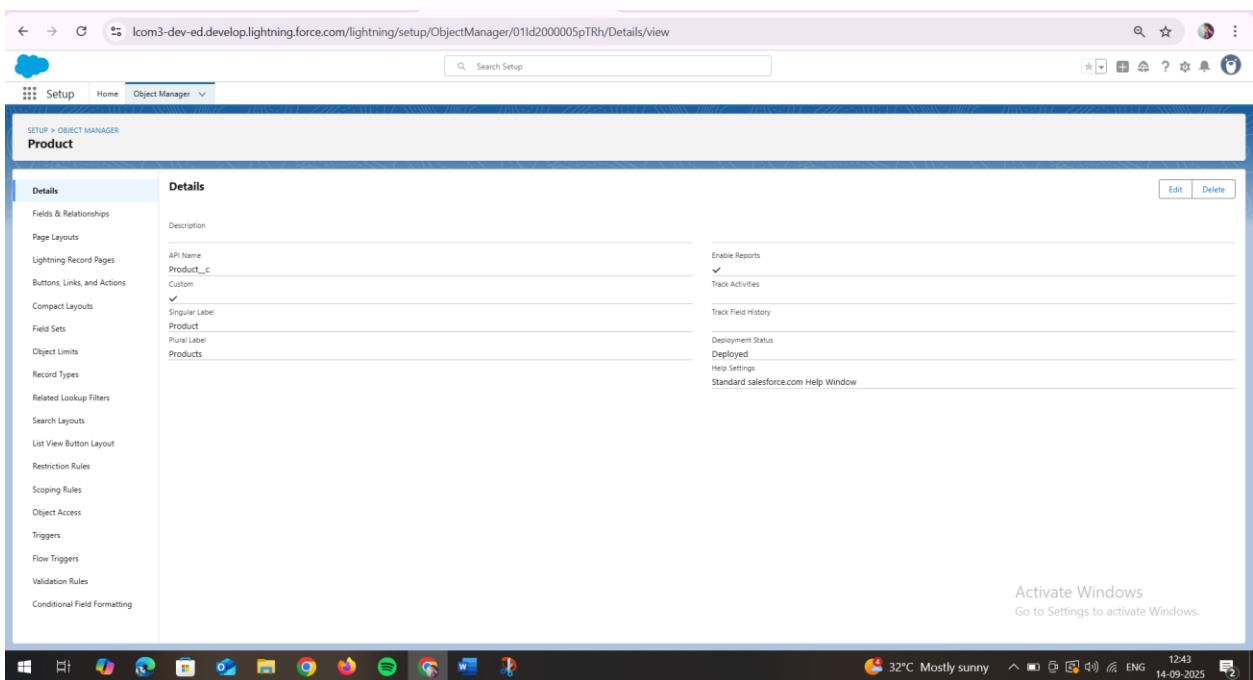
2. DEVELOPMENT PHASE

Creating developer account:

By Using this URL - <https://developer.salesforce.com/signup>



- Created custom objects: Supplier, Product, Purchase Order, Transaction.
- **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 and follow as it is.



← → ⌂ orgfarm-a1f0895c61-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgK000001zw89/Details/view

Setup Home Object Manager

SETUP > OBJECT MANAGER
Supplier

Details

Description

API Name
Supplier_c

Custom
✓

Singular Label
Supplier

Plural Label
Suppliers

Details

Edit Delete

Enable Reports
✓

Track Activities

Track Field History

Deployment Status
Deployed

Help Settings
Standard salesforce.com Help Window

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

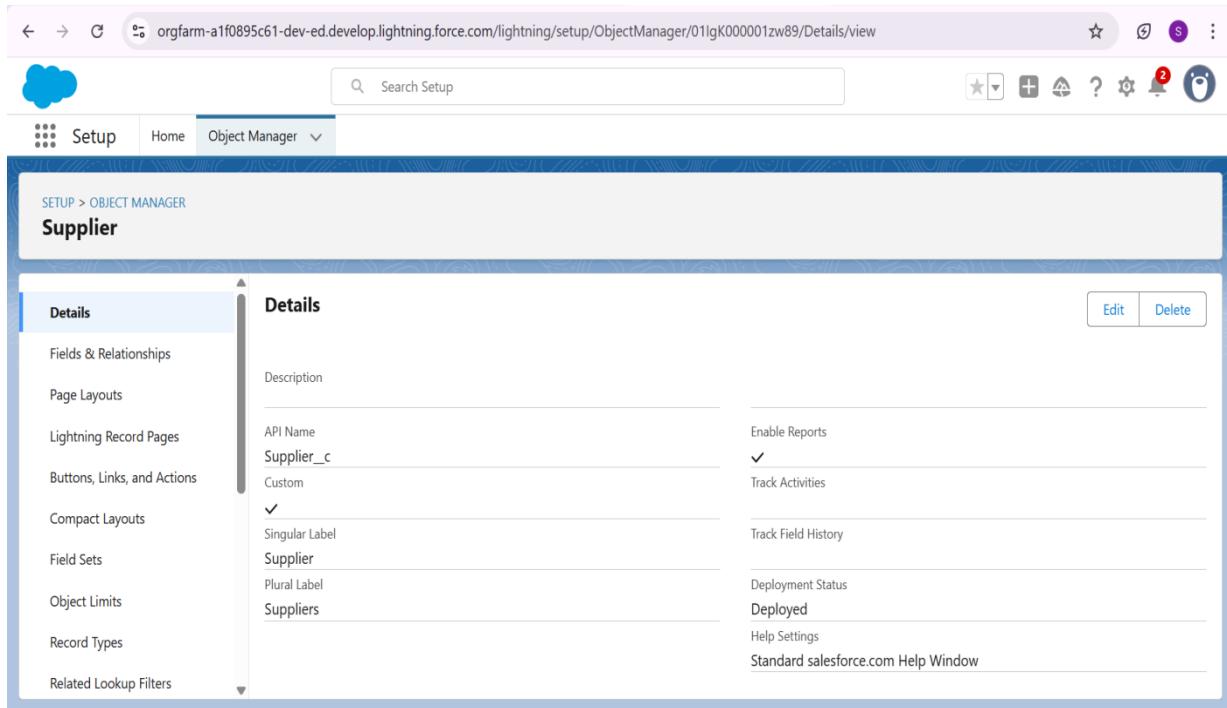
Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters



← → ⌂ orgfarm-a1f0895c61-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgK000001zvOz/Details/view

Setup Home Object Manager

SETUP > OBJECT MANAGER
Purchase Order

Details

Description

API Name
Purchase_Order__c

Custom
✓

Singular Label
Purchase Order

Plural Label
Purchase Orders

Details

Edit Delete

Enable Reports
✓

Track Activities

Track Field History

Deployment Status
Deployed

Help Settings
Standard salesforce.com Help Window

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

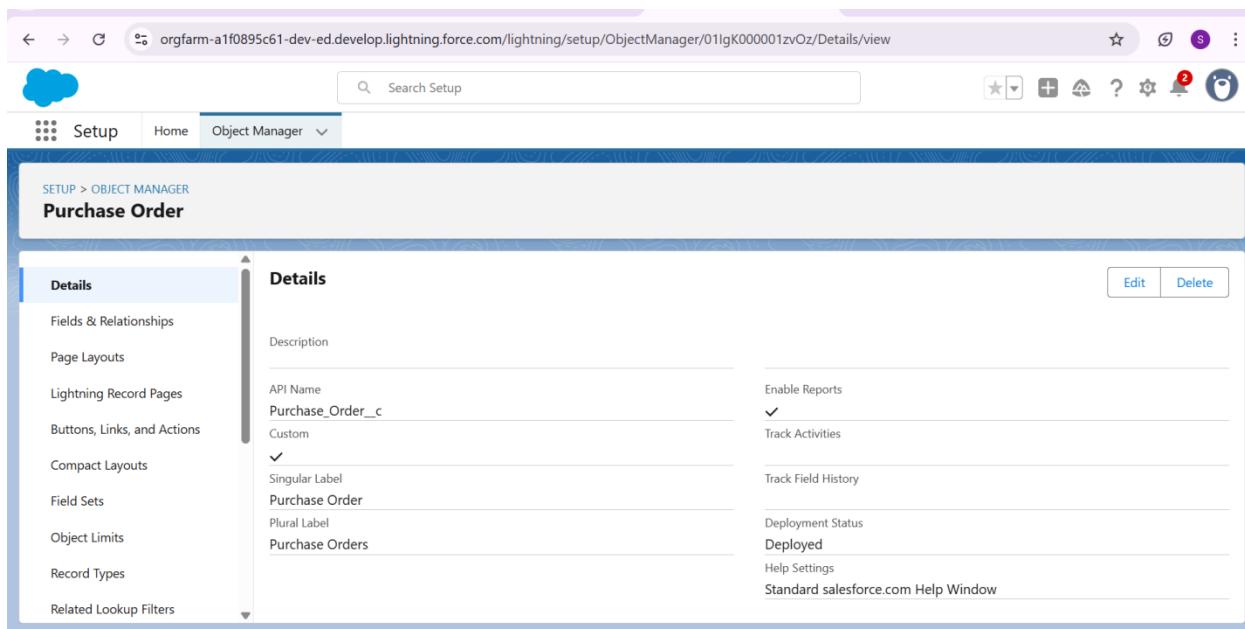
Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters



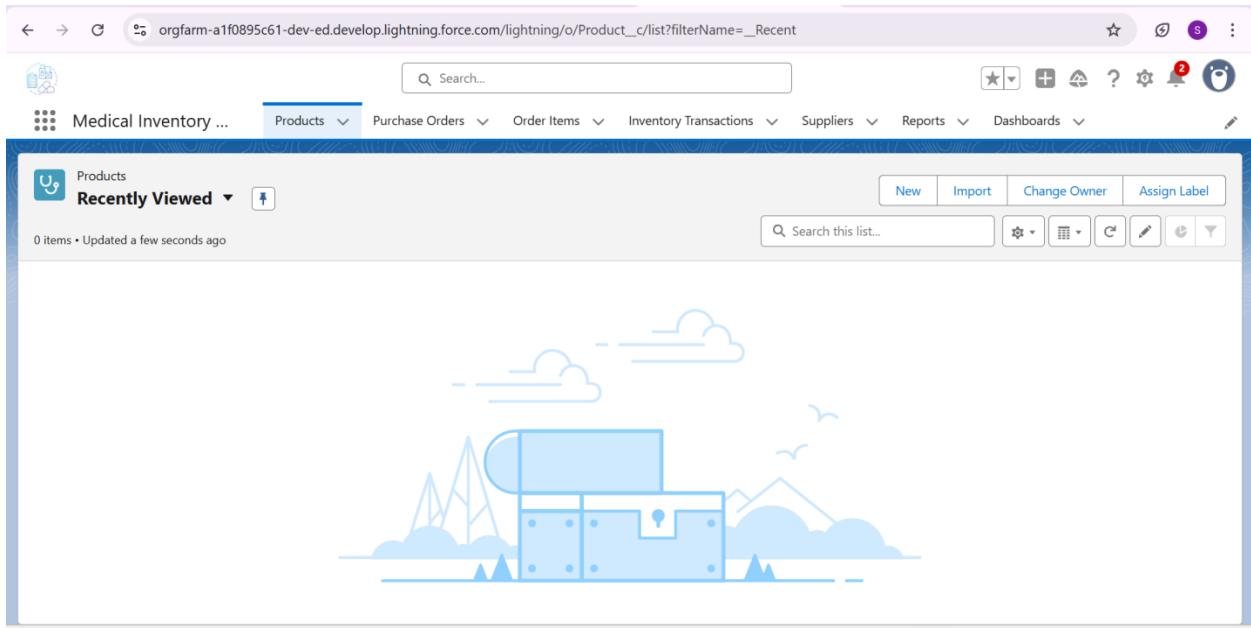
The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes links for Setup, Home, and Object Manager. The main title is "SETUP > OBJECT MANAGER" followed by "Inventory Transaction". On the left, a sidebar lists various configuration tabs: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, and Related Lookup Filters. The "Details" tab is selected. The main content area displays the "Details" section for the "Inventory Transaction" object. It includes fields for Description, API Name (set to "Inventory_Transaction__c"), Custom (checked), Singular Label ("Inventory Transaction"), Plural Label ("Inventory Transactions"), Enable Reports (checked), Track Activities, Track Field History, Deployment Status (set to "Deployed"), Help Settings, and a link to the "Standard salesforce.com Help Window". There are "Edit" and "Delete" buttons in the top right corner of the main content area.

• 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.

Action	Label	Tab Style	Description
Edit Del	Inventory Transactions	Treasure chest	
Edit Del	Order Items	Balls	
Edit Del	Products	Stethoscope	
Edit Del	Purchase Orders	Box	
Edit Del	Suppliers	Hands	

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



- **Added custom fields to objects.**

- **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 Name" and Length 255.
8. Select Required Field.
9. Click Next, Next, then Save & New.

lcom3-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01Id2000005pTRh/FieldsAndRelationships/00Nd200001KvtTZ/view

Setup Home Object Manager

SETUP > OBJECT MANAGER Product

Product Custom Field Product Name Back to Product Validation Rules Help

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 Restriction Rules Scoping Rules Object Access Triggers Flow Triggers Validation Rules Conditional Field Formatting

Custom Field Definition Detail Edit Set Field-Level Security View Field Accessibility Where is this used?

Field Information Field Label Product Name Field Name Product_Name API Name Product_Name_c Description Help Text Data Owner Field Usage Data Sensitivity Level Compliance Categorization Created By Chashana L 07/09/2025, 11:14 am Modified By Chashana L 07/09/2025, 11:14 am Object Name Product Data Type Text

General Options Required Unique Case Sensitive External ID Default Value

Text Options Length 255

Validation Rules New Validation Rules Help

No validation rules defined.

Activate Windows Go to Settings to activate Windows.

32°C Mostly sunny 12:59 14-09-2025

lcom3-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01Id2000005pTRh/FieldsAndRelationships/00Nd200001KvtTZ/view

Setup Home Object Manager

SETUP > OBJECT MANAGER Product

Product Custom Field Product Name Back to Product Validation Rules Help

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 Restriction Rules Scoping Rules Object Access Triggers Flow Triggers Validation Rules Conditional Field Formatting

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General Options Required Unique Case Sensitive External ID Default Value

Text Options Length 255

Validation Rules New Validation Rules Help

No validation rules defined.

Activate Windows Go to Settings to activate Windows.

lcom3-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01Id2000005pTRh/FieldsAndRelationships/00Nd200001KvrV1/view

Product Custom Field
Current Stock Level

Custom Field Definition Detail

Field Information

Field Label	Current Stock Level	Validation Rules	
Field Name	Current_Stock_Level	Object Name	Product
API Name	Current_Stock_Level_c	Data Type	Number
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Dhanshana L	Modified By	Dhanshana L
	07/09/2025, 11:46 am		07/09/2025, 11:46 am

General Options

Required	<input type="checkbox"/>
Unique	<input type="checkbox"/>
External ID	<input type="checkbox"/>
AI Prediction	<input type="checkbox"/>
Default Value	

Number Options

Length	18
Decimal Places	0

Validation Rules

No validation rules defined.

Always show me ▾ more records per related list

Help for this Page

Activate Windows
Go to Settings to activate Windows.

Setup Home Object Manager

32°C Mostly sunny 13:17 14-09-2025

Product Custom Field

Unit Price

Custom Field Definition Detail

Field Information

Field Label	Unit Price	Validation Rules	
Field Name	Unit_Price	Object Name	Product
API Name	Unit_Price_c	Data Type	Currency
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Dhanshana L	Modified By	Dhanshana L
	07/09/2025, 11:47 am		07/09/2025, 11:47 am

General Options

Required	<input checked="" type="checkbox"/>
Default Value	

Currency Options

Length	18
Decimal Places	2

Validation Rules

No validation rules defined.

Always show me ▾ more records per related list

Help for this Page

Activate Windows
Go to Settings to activate Windows.

Setup Home Object Manager

32°C Mostly sunny 13:18 14-09-2025

lcom3-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01d200005xprd/FieldsAndRelationships/00Nd200001LH6N/view

Setup Home Object Manager

Purchase Order

Purchase Order Custom Field Supplier ID

Fields & Relationships

Custom Field Definition Detail

Field Information

Field Label	Supplier ID
Field Name	Supplier_ID
API Name	Supplier_ID_c
Description	
Help Text	
Data Owner	
Field Usage	
Data Sensitivity Level	
Compliance Categorization	
Created By	Chashana.L 12/09/2025, 10:22 am
Modified By	Chashana.L 12/09/2025, 10:22 am

Object Name: Purchase_Order
Data Type: Lookup

Lookup Options

Related To	Supplier
Related List Label	Purchase Orders
Required	<input checked="" type="checkbox"/>

Child Relationship Name: Purchase_Orders1

What to do if the lookup record is deleted? Don't allow deletion of the lookup record that's part of a lookup relationship.

Validation Rules

No validation rules defined.

Activate Windows
Go to Settings to activate Windows.

32°C Mostly sunny 13:22 14-09-2025

lcom3-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01d200005xprd/FieldsAndRelationships/00Nd200001LGybW/view

Setup Home Object Manager

Purchase Order

Purchase Order Custom Field Order Date

Fields & Relationships

Custom Field Definition Detail

Field Information

Field Label	Order Date
Field Name	Order_Date
API Name	Order_Date_c
Description	
Help Text	
Data Owner	
Field Usage	
Data Sensitivity Level	
Compliance Categorization	
Created By	Chashana.L 12/09/2025, 10:23 am
Modified By	Chashana.L 12/09/2025, 10:23 am

Object Name: Purchase_Order
Data Type: Date

General Options

Required	<input type="checkbox"/>
Default Value	

Validation Rules

No validation rules defined.

Activate Windows
Go to Settings to activate Windows.

32°C Mostly sunny 13:24 14-09-2025

lcom3-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01ld200005xprd/FieldsAndRelationships/00Nd200001LH6PO/view

Setup Home Object Manager

Purchase Order

Purchase Order Custom Field
Order Count

Back to Purchase Order

Help for this Page

Custom Field Definition Detail

Field Information

Field Label	Order Count
Field Name	Order_Count
API Name	Order_Count__c
Description	
Help Text	
Data Owner	
Field Usage	
Data Sensitive Level	
Compliance Category	
Created By	Charnana_L_ 12/09/2025, 10:42 am
Modified By	Charnana_L_ 12/09/2025, 10:42 am

Object Name: Purchase Order

Roll-Up Summary Options

Data Type	Roll-Up Summary
Summarized Object	Order Item
Filter Criteria	

Summary Type: COUNT

Activate Windows
Go to Settings to activate Windows.

Windows Taskbar: 32°C Mostly sunny 13:26 14-09-2025

lcom3-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01ld200005pRsD/FieldsAndRelationships/00Nd200001LHcjview

Setup Home Object Manager

Order Item

Order Item Custom Field
Unit Price

Back to Order Item

Help for this Page

Custom Field Definition Detail

Field Information

Field Label	Unit Price
Field Name	Unit_Price
API Name	Unit_Price__c
Description	
Help Text	
Data Owner	
Field Usage	
Data Sensitive Level	
Compliance Category	
Created By	Charnana_L_ 12/09/2025, 11:01 am
Modified By	Charnana_L_ 12/09/2025, 11:01 am

Object Name: Order Item

Formula Options

Data Type	Formula
Decimal Places	2

Product_ID__c Unit_Price__c

Activate Windows
Go to Settings to activate Windows.

Windows Taskbar: 32°C Mostly sunny 13:28 14-09-2025

lcom3-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01ld2000005pRsD/FieldsAndRelationships/00Nd200001LHLZh/view

Setup Home Object Manager

Order Item

Details Fields & Relationships

Amount

Back to Order Item

Custom Field Definition Detail

Field Label: Amount
Field Name: Amount
API Name: Amount__c
Description:
Help Text:
Data Owner:
Field Usage:
Data Sensitivity Level:
Compliance Categorization:
Created By: Chanchana_L 12/09/2025, 11:17 am
Modified By: Chanchana_L 12/09/2025, 11:17 am

Object Name: Order Item
Data Type: Formula
Decimal Places: 2
Formula Options: Data Type: Formula
Quantity_Received__c * Unit_Price__c

Help for this Page

Activate Windows
Go to Settings to activate Windows.

This screenshot shows the configuration of a custom field named 'Amount' for the 'Order Item' object. The field is defined as a formula type with a decimal place setting of 2. It uses the formula 'Quantity_Received__c * Unit_Price__c'. The field has various metadata settings like field label, API name, and help text.

lcom3-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01ld2000005pQqE/FieldsAndRelationships/00Nd200001LFu0T/view

Setup Home Object Manager

Inventory Transaction

Details Fields & Relationships

Transaction Type

Back to Inventory Transaction

Custom Field Definition Detail

Field Label: Transaction Type
Field Name: Transaction_Type
API Name: Transaction_Type__c
Description:
Help Text:
Data Owner:
Field Usage:
Data Sensitivity Level:
Compliance Categorization:
Created By: Chanchana_L 11/09/2025, 10:02 pm
Modified By: Chanchana_L 11/09/2025, 10:02 pm

Object Name: Inventory Transaction
Data Type: Picklist

General Options
Required:
Default Value:

Picklist Options
Restrict picklist to the values defined in the value set:
Controlling Field: Item

Picklist Values Used
Active and inactive picklist values: 3 (1,000 max)

Field Dependencies
No dependencies defined

Validation Rules
No validation rules defined

Help for this Page

Activate Windows
Go to Settings to activate Windows.

This screenshot shows the configuration of a custom field named 'Transaction Type' for the 'Inventory Transaction' object. The field is defined as a picklist type. It includes options for restricting values based on a value set and defining a controlling field. There are no dependencies or validation rules defined.

lcom3-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01Id2000005pOqE/FieldsAndRelationships/00Nd200001LjtW4/view

Setup Home Object Manager

Inventory Transaction

Total Order Cost

Back to Inventory Transaction

Custom Field Definition Detail

Validation Rules Help

Help for this Page

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

Restriction Rules

Scoping Rules

Object Access

Triggers

Flow Triggers

Validation Rules

Conditional Field Formatting

Field Label: Total Order Cost
Field Name: Total_Order_Cost
API Name: Total_Order_Cost_c
Description:
Help Text:
Data Owner:
Field Usage:
Data Sensitivity Level:
Compliance Categorization:
Created By: Dhanshara L 12/09/2025, 10:28 pm
Modified By: Dhanshara L 12/09/2025, 10:28 pm

Object Name: Inventory Transaction
Data Type: Currency

General Options

Required:

Default Value:

Currency Options

Length: 16
Decimal Places: 2

Validation Rules

No validation rules defined.

Validation Rules Help

Activate Windows
Go to Settings to activate Windows.

lcom3-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01Id2000005pUqn/FieldsAndRelationships/00Nd200001LH6Dr/view

Setup Home Object Manager

Supplier

Phone Number

Back to Supplier

Custom Field Definition Detail

Validation Rules Help

Help for this Page

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

Restriction Rules

Scoping Rules

Object Access

Triggers

Flow Triggers

Validation Rules

Conditional Field Formatting

Field Label: Phone Number
Field Name: Phone_Number
API Name: Phone_Number_c
Description:
Help Text:
Data Owner:
Field Usage:
Data Sensitivity Level:
Compliance Categorization:
Created By: Dhanshara L 12/09/2025, 10:33 am
Modified By: Dhanshara L 12/09/2025, 10:33 am

Object Name: Supplier
Data Type: Phone

General Options

Required:

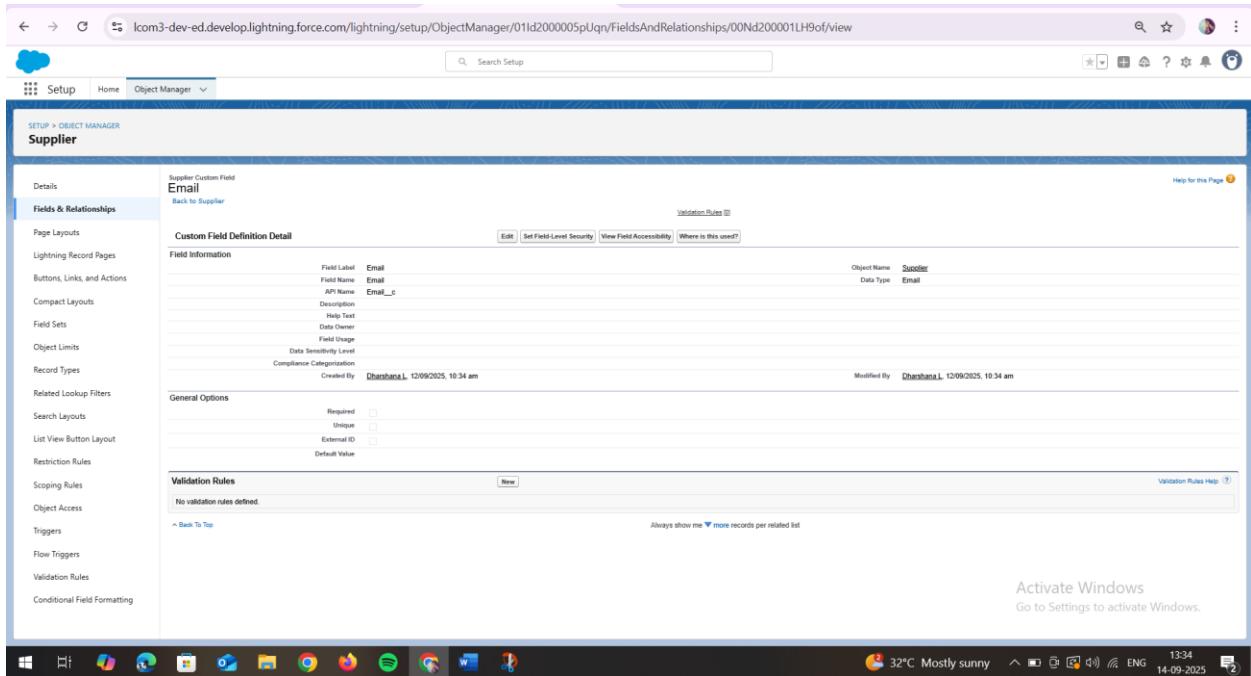
Default Value:

Validation Rules

No validation rules defined.

Validation Rules Help

Activate Windows
Go to Settings to activate Windows.



Updating of Page Layouts

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

lcom3-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01d2000005pTRh/PageLayouts/00hd200000FbxIDAAZ/view

Setup Home Object Manager

SETUP > OBJECT MANAGER Product

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

Product ID

Last Modified By

Product Name

Product Description

Current Stock Level

Product Unit Price

Product Sample

Highlights Panel

Customize the highlights panel for this page layout.

Quick Actions in the Salesforce Classic Publisher

Actions in this section are currently inherited from the global publisher layout. You can override the global publisher layout to set a customized list of actions for the publisher on pages that use this layout.

Salesforce Mobile and Lightning Experience Actions

Actions in this section are predefined by Salesforce. You can override the predefined actions to set a customized list of actions on Lightning Experience and mobile app pages that use this layout. If you customize the actions in the Quick Actions in the Salesforce Classic Publisher section, and have saved the layout, then this section inherits that set of actions by default when you click to override.

Product Detail

Standard Buttons Edit Delete Home Change Owner Change Record Type Printable View Sharing Sharing Hierarchy Edit Labels Custom Buttons

Information (Header visible on edit only)

Product ID: Sample Test

Product Name: Sample Test

Product Description: Sample Test

User Price: \$123.45

Current Stock Level: 54 107

Minimum Stock Level: 71 056

Owner: Sample Test

Created By: Sample Test

Last Modified By: Sample Test

Activate Windows

Go to Settings to activate Windows.

Windows Taskbar: 32°C Mostly sunny 13:41 ENG 14-09-2025

lcom3-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01d2000005pxrd/PageLayouts/00hd200000Fv97ZAAR/view

Setup Home Object Manager

SETUP > OBJECT MANAGER Purchase Order

Purchase Order Layout

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

Fields

Buttons

Quick Actions

Mobile & Lighting Actions

Expanded Lookups

Related Lists

Report Charts

Purchase Order ID

Last Modified By

Purchase Order

Total Order Cost

Actual Delivery Date

Order Count

Order Date

Supplier ID

Purchase Order Detail

Standard Buttons Edit Delete Home Change Owner Change Record Type Printable View Sharing Sharing Hierarchy Edit Labels Custom Buttons

Information (Header visible on edit only)

Purchase Order ID: Sample Test

Supplier ID: Sample Test

Order Date: 14/09/2025

Actual Delivery Date: 14/09/2025

Expected Delivery Date: 14/09/2025

Order Count: 59 432

Total Order Cost: 6,931

Owner: Sample Test

Purchase Order Sample

Highlights Panel

Customize the highlights panel for this page layout.

Quick Actions in the Salesforce Classic Publisher

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Purchase Order Detail

Activate Windows

Go to Settings to activate Windows.

Windows Taskbar: 32°C Mostly sunny 13:43 ENG 14-09-2025

lcom3-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01d200005pRsD/PageLayouts/00hd20000Fbb3AAB/view

Setup > Object Manager Order Item

Order Item Layout

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 Restriction Rules Scoping Rules Object Access Triggers Flow Triggers Validation Rules Conditional Field Formatting

Fields

Buttons Quick Actions Mobile & Lightning Actions Expanded Lookups Related Lists Derived Fields

Quick Find: Field Name: Blank Space

Last Modified By: Purchase Order: Total Order Cost: Order Item ID: Order Item Name: Quantity Ordered: Created By: Product ID: Quantity Received:

Order Item Sample

Highlights Panel

Customize the highlights panel for this page layout.

Quick Actions in the Salesforce Classic Publisher

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Order Item Detail

Information (Header visible on edit only)

Order Item ID: GEN2004-001234
Amount: \$123.45
Order Item Name: Sample Test
Purchase Order: Sample Test
Total Order Cost: \$123.45

Purchase Order ID: Sample Test

Product Details

Product ID: Sample Test

Quantity Ordered: 54.015

Activate Windows

Go to Settings to activate Windows.

Windows Taskbar: 32°C Mostly sunny, ENG, 13:48, 14-09-2025

lcom3-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01d200005pOqE/PageLayouts/00hd20000FboA8AAJ/view

Setup > Object Manager Inventory Transaction

Inventory Transaction Layout

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 Restriction Rules Scoping Rules Object Access Triggers Flow Triggers Validation Rules Conditional Field Formatting

Fields

Buttons Quick Actions Mobile & Lightning Actions Expanded Lookups Related Lists Derived Fields

Quick Find: Field Name: Blank Space

Last Modified By: Transaction Date: Owner: Transaction ID: Created By: Purchase Order ID: Transaction Type: Inventory Transaction: Total Order Cost:

Inventory Transaction Sample

Highlights Panel

Customize the highlights panel for this page layout.

Quick Actions in the Salesforce Classic Publisher

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Salesforce Mobile and Lightning Experience Actions

Actions in this section are predefined by Salesforce. You can override the predefined actions to set a customized list of actions on Lightning Experience and mobile app pages that use this layout. If you customize the actions in the Quick Actions in the Salesforce Classic Publisher section, and have saved the layout, then this section inherits that set of actions by default when you click to override.

Inventory Transaction Detail

Information (Header visible on edit only)

Transaction ID: GEN2004-001234
Purchase Order ID: Sample Test
Transaction Date: 2025-09-14T00:00:00Z
Owner: Sample Test
Total Order Cost: \$123.45
Inventory: Sample Test
Transaction Name:

Activate Windows

Go to Settings to activate Windows.

Windows Taskbar: 32°C Mostly sunny, ENG, 13:50, 14-09-2025

The screenshot shows the Salesforce Setup interface for creating a Supplier Layout. The left sidebar lists various setup categories. The main area shows the 'Supplier Layout' configuration screen with tabs for 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, Restriction Rules, Scoping Rules, Object Access, Triggers, Flow Triggers, Validation Rules, and Conditional Field Formatting.

Fields & Relationships

Page Layouts

Supplier Layout

Supplier Sample

Supplier Detail

Activate Windows
Go to Settings to activate Windows.

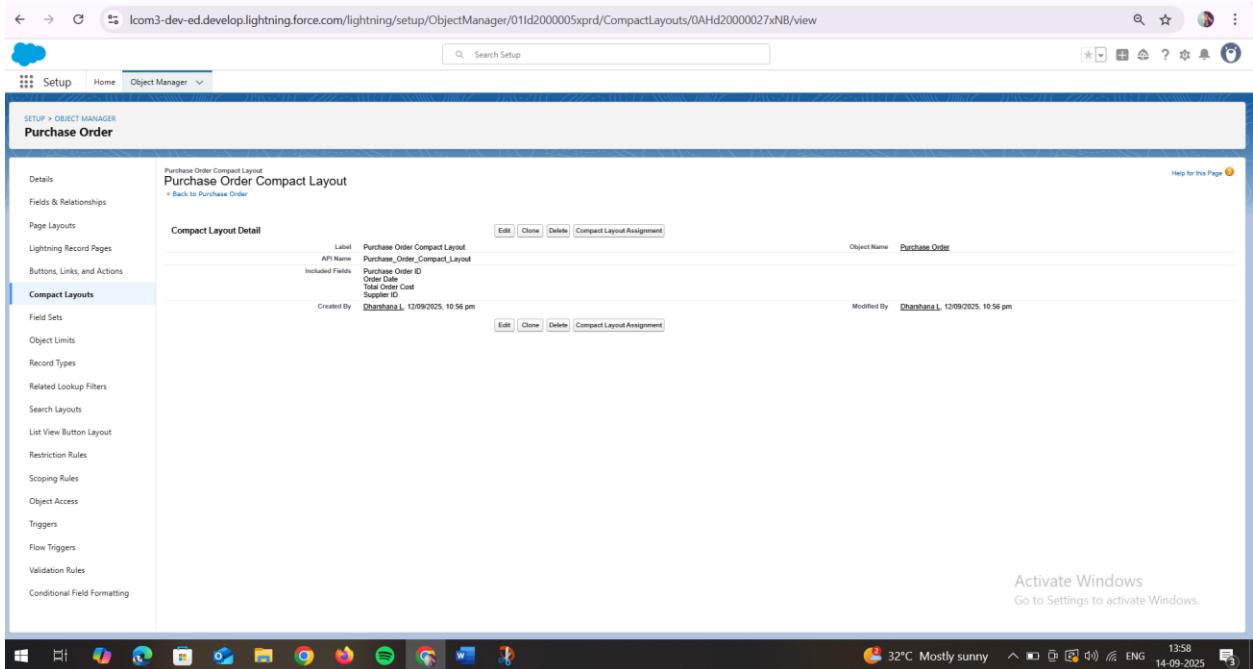
• To create a Compact Layout to a Product Object

The screenshot shows the Salesforce Setup interface for creating a Product Compact Layout. The left sidebar lists various setup categories. The main area shows the 'Product Compact Layout' configuration screen with tabs for 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, Restriction Rules, Scoping Rules, Object Access, Triggers, Flow Triggers, Validation Rules, and Conditional Field Formatting.

Compact Layout Detail

Label	Product Compact Layout	Object Name	Product
API Name	Product_Compact_Layout	Created By	Eshanika L
Included Fields	Product Name Unit Price Current Stock Level	Modified By	Eshanika L

Activate Windows
Go to Settings to activate Windows.



Validation Rules

- Go to setup >> click on Object Manager >> type object name(Purchase Order) in quick find box>> click on the Purchase Order object
- Click on the validation rule >> click on New.
- Enter the Rule name as “Expected Delivery Date Validation”.
- Select Active
- Insert the Error Condition Formula as :
(Expected_Delivery_Date__c - Order_Date__c)> 7
- Enter the Error Message as “The Expected Delivery Date should not exceed 7 days.”.
- Select the Error location as Top of Page
- Click Save.

The screenshot shows the Salesforce Setup interface for the Purchase Order object. The left sidebar is expanded to show various configuration options under the 'Purchase Order' tab. The main content area displays a 'Validation Rule Detail' for a rule named 'Expected_Delivery_Date_Validation'. The rule checks if the 'Expected_Delivery_Date__c' field is less than or equal to 7 days from the 'Order_Date__c' field. The error message is 'The Expected Delivery Date should not exceed 7 days'. The rule was created by 'Dharshana L' on 12/09/2025 at 11:01 pm and modified by the same user on the same date and time.

Profiles

- 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 Salesforce Setup interface for managing profiles. The left sidebar has 'Profiles' selected. The main content area displays a list of profiles. The 'Standard User' profile is highlighted with a red box. The table includes columns for Action, Profile Name, User License, and Custom. Other profiles listed include 'Salesforce API Only System Integrations', 'Silver Partner User', 'Solution Manager', 'Standard Platform User', and 'System Administrator'.

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

- While still on the profile page, then click Edit.
- Select the Custom App settings as default for the Medical Inventory Management.

Custom App Settings						
	Visible	Default		Visible	Default	
All Tabs (standard__AllTabSet)	<input checked="" type="checkbox"/>	<input type="radio"/>		Sales (standard__Lightning_Sales)	<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"/>				

- 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 <small>i</small>	Modify All <small>i</small>
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"/>					

- Change the password policies as mentioned :
- User passwords expire in should be “ never expires ”.

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

The screenshot shows the Salesforce Setup Profiles page for the 'Inventory Manager' profile. The profile details are as follows:

- Name:** Inventory Manager
- User License:** Salesforce
- Description:** Created By: Chandana L, 12/09/2025, 11:04 pm
- Modified By:** Chandana L, 13/09/2025, 11:01 am

Page Layouts

Standard Object Layouts	Location Group Assignment
Global Global Layout [View Assignment]	Location Group Assignment Layout [View Assignment]
Email Application Not Assigned [View Assignment]	Macro Macro Layout [View Assignment]
Home Page Layout DE Default [View Assignment]	Object Milestone Object Milestone Layout [View Assignment]
Account Account Layout [View Assignment]	Operating Hours Operating Hours Layout [View Assignment]
Alternative Payment Method Alternative Payment Method Layout [View Assignment]	Opportunity Opportunity Layout [View Assignment]
Appointment Invitation Appointment Invitation Layout [View Assignment]	Opportunity Product Opportunity Product Layout [View Assignment]
Asset Asset Layout [View Assignment]	Order Order Layout [View Assignment]
Asset Action Asset Action Layout [View Assignment]	Order Product Order Product Layout [View Assignment]
Asset Action Source Asset Action Source Layout [View Assignment]	Payment Payment Layout [View Assignment]
Asset Relationship Asset Relationship Layout [View Assignment]	Payment Authorization Payment Authorization Layout [View Assignment]
Asset State Period Asset State Period Layout [View Assignment]	Payment Authorization Adjustment Payment Authorization Adjustment Layout [View Assignment]
Assigned Resource Assigned Resource Layout [View Assignment]	Payment Gateway Payment Gateway Layout [View Assignment]
Associated Location Associated Location Layout [View Assignment]	Payment Gateway Log Payment Gateway Log Layout [View Assignment]

At the bottom right of the page, there is a message: "Activate Windows Go to Settings to activate Windows."

The screenshot shows the Salesforce Setup Profiles page for the 'Purchase Manager' profile. The profile details are as follows:

- Name:** Purchase Manager
- User License:** Salesforce
- Description:** Created By: Chandana L, 12/09/2025, 11:19 pm
- Modified By:** Chandana L, 13/09/2025, 11:04 am

Page Layouts

Standard Object Layouts	Location Group Assignment
Global Global Layout [View Assignment]	Location Group Assignment Layout [View Assignment]
Email Application Not Assigned [View Assignment]	Macro Macro Layout [View Assignment]
Home Page Layout DE Default [View Assignment]	Object Milestone Object Milestone Layout [View Assignment]
Account Account Layout [View Assignment]	Operating Hours Operating Hours Layout [View Assignment]
Alternative Payment Method Alternative Payment Method Layout [View Assignment]	Opportunity Opportunity Layout [View Assignment]
Appointment Invitation Appointment Invitation Layout [View Assignment]	Opportunity Product Opportunity Product Layout [View Assignment]
Asset Asset Layout [View Assignment]	Order Order Layout [View Assignment]
Asset Action Asset Action Layout [View Assignment]	Order Product Order Product Layout [View Assignment]
Asset Action Source Asset Action Source Layout [View Assignment]	Payment Payment Layout [View Assignment]
Asset Relationship Asset Relationship Layout [View Assignment]	Payment Authorization Payment Authorization Layout [View Assignment]
Asset State Period Asset State Period Layout [View Assignment]	Payment Authorization Adjustment Payment Authorization Adjustment Layout [View Assignment]
Assigned Resource Assigned Resource Layout [View Assignment]	Payment Gateway Payment Gateway Layout [View Assignment]
Associated Location Associated Location Layout [View Assignment]	Payment Gateway Log Payment Gateway Log Layout [View Assignment]

At the bottom right of the page, there is a message: "Activate Windows Go to Settings to activate Windows."

Roles

- Created roles to define data visibility across users.
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 “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.

The screenshot shows the Salesforce Setup Roles page. On the left, there's a sidebar with a search bar ('Q roles') and a 'Roles' item under 'Users'. The main area displays a 'Sample Role Hierarchy' diagram:

```

graph TD
    CEO[CEO - President, CFO, VP_Sales] --> WesternSalesDir[Western Sales Director]
    CEO --> EasternSalesDir[Eastern Sales Director]
    CEO --> InternationalSalesDir[International Sales Director]
    WesternSalesDir --> CARep[CA Sales Rep]
    WesternSalesDir --> NYRep[NY Sales Rep]
    EasternSalesDir --> MARep[MA Sales Rep]
    InternationalSalesDir --> AsianRep[Asian Sales Rep]
    InternationalSalesDir --> EuropeanRep[European Sales Rep]
  
```

Each role has associated permissions listed to its right. At the bottom right of the page is a 'Set Up Roles' button.

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 'Role Edit' page for a 'New Role'. The 'Label' field is set to 'Inventory Manager'. The 'Role Name' field is automatically populated with 'Inventory_Manager'. The 'This role reports to' field is set to 'SVP, Sales & Marketing'. The 'Save' button at the bottom is highlighted with a red box.

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

Permission Sets

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. In the top navigation bar, 'Setup' is selected. Below it, there are links for 'Home' and 'Object Manager'. A search bar labeled 'Permission' is present. On the left sidebar, 'Permission Set Groups' and 'Permission Sets' are listed under 'Users', with 'Permission Sets' highlighted by a red box. Under 'Custom Code', 'Custom Permissions' is listed. A message at the bottom left says ' Didn't find what you're looking for? Try using Global Search.' The main content area is titled 'Permission Sets' and contains a table with columns for 'Action', 'Permission Set Label', 'Description', and 'License'. The 'Permission Set Label' column is sorted. The first row, 'Buyer', is highlighted with a red box. The 'Save' and 'Cancel' buttons are visible at the bottom right of the table.

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

The screenshot shows the 'Create Permission Set' dialog box. At the top, it says 'Permission Set Create'. The main section is titled 'Enter permission set information'. It has fields for 'Label' (containing 'Purchase Manager Create Access'), 'API Name' (containing 'Purchase_Manager'), 'Description' (empty), and 'Session Activation Required' (unchecked). At the bottom right, there is a 'Save' button highlighted with a red box and a 'Cancel' button.

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

The screenshot shows the 'Permission Sets' page in Salesforce. At the top, there's a 'Permission Set' header with 'Purchase Manager Create Access'. Below it is a toolbar with 'Find Settings...', 'Clone', 'Delete', 'Edit Properties', 'Manage Assignments', and 'View Summary'. Underneath is a breadcrumb trail: 'Permission Set Overview > Object Settings > Order Items'. The main area has two tabs: 'Order Items' (selected) and 'Tab Settings'. The 'Order Items' tab includes a 'Save' button. The 'Tab Settings' section has a table with columns 'Available' and 'Visible'. The 'Visible' column has checkboxes for 'Read', 'Create', 'Edit', 'Delete', 'View All', and 'Modify All', with 'Read' and 'Create' checked. The 'Object Permissions' section lists permissions like 'Read', 'Create', 'Edit', etc., each with an 'Enabled' checkbox, where 'Read' and 'Create' are also checked. A red box highlights the 'Visible' table and the 'Enabled' checkboxes for 'Read' and 'Create'.

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

The screenshot shows the 'Select Users to Assign' screen. At the top, it says '... > PERMISSION SET 'PURCHASE MANAGER CREATE ACCESS' > MANAGE ASSIGNMENT EXPIRATION'. Below is a heading 'Purchase Manager Create Access'. The main area is titled 'Select Users to Assign' and shows a table of 'Active Users'. The table has columns: Full Name, Alias, Username, Role, Active, and Profile. There are checkboxes next to each user. A red box highlights the checkbox for 'John PurchaseM' and the 'Next' button at the bottom right of the table.

Full Name	Alias	Username	Role	Active	Profile
Annapurna Gurrum	AGurr	medicalinventory@sb.com	System Administrator	<input checked="" type="checkbox"/>	
Chatter Expert	Chatter	chatty.00dd0000058bqlua.yrgohck7wjvo@chatter.salesforce.com	Chatter Free User	<input checked="" type="checkbox"/>	
Integration User	integ	integration@00dd0000058bqlua.com	Analytics Cloud Integration User	<input checked="" type="checkbox"/>	
John PurchaseM	jpurc	john@purchasem.com	Purchasing Manager	<input checked="" type="checkbox"/>	Purchase Manager
Security User	sec	insightssecurity@00dd0000058bqlua.com	Analytics Cloud Security User	<input checked="" type="checkbox"/>	

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

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

Purchase Manager Create Access

Select an Expiration Option For Assigned Users

No expiration date

Specify the expiration date

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

Time Zone
Select a time zone...

Selected Users

Full Name	Role	Profile	Active	User License	Expires On
John PurchaseM	Purchasing Manager	Purchase Manager	✓	Salesforce	Never Expires

Cancel Back

Flows

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 .

New Flow

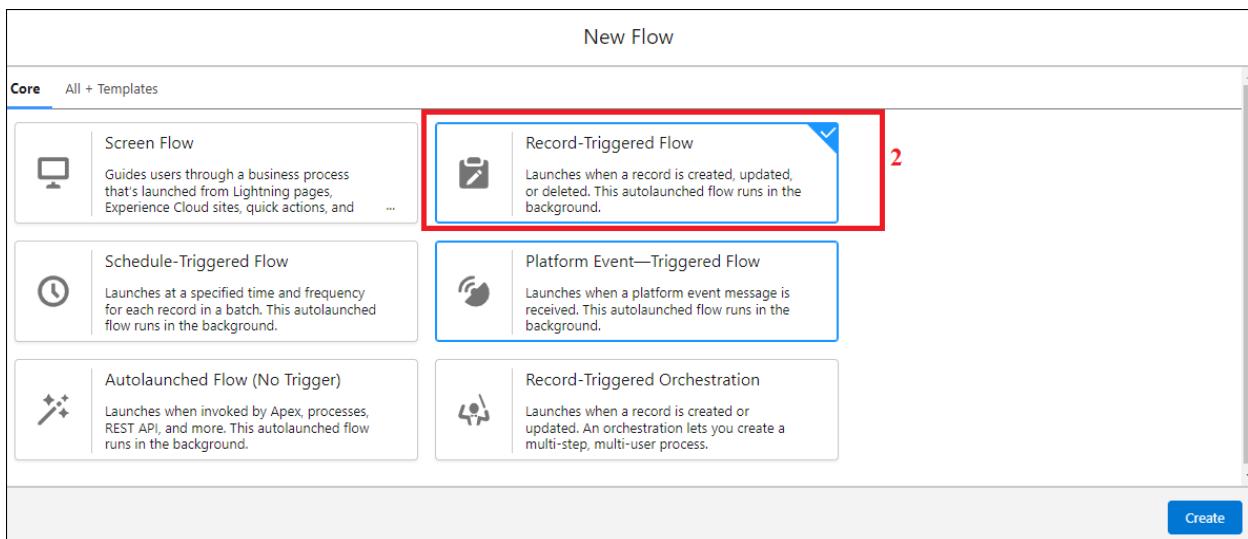
Select how you'd like to start building your automation.

Start From Scratch
Select your automation type and start building on an empty canvas.

Use a Template
Select a pre-built flow and customize it to fit your needs.

Back Next

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



3. Under Object select “Purchase Order”
4. Select A record is created or updated

The screenshot shows the 'Configure Start' screen for a flow trigger. It includes the following sections:

- Select Object:** The 'Object' field is set to 'Purchase Order' (highlighted with a red box and red number '3').
- Configure Trigger:** The 'Trigger the Flow When:' section contains the following options:
 - A record is created
 - A record is updated
 - A record is created or updated (highlighted with a red box and red number '4')
 - A record is deleted

5. Set Entry Conditions : None
6. Select Fast Field Updates and click on Done

Set Entry Conditions

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

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

Condition Requirements

None

5

* Optimize the Flow for:

Fast Field Updates

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

6

Actions and Related Records

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

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

7. Under the record trigger flow click on the “+” icon and select Get Records.
8. Enter Label as “ Get Purchase Record ”.
9. For Object select Purchase Order.
10. For Condition Requirements , select All Conditions are Met(AND)

For the first condition select as follows:

Field: Id

Operator: Equals

Value: {!\$Record.Id}

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

+ 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 **11**

+ Add Field

13. In the Flow Builder, click on the Manager tab on the left-hand side >> Click on New Resource >> In the Resource Type dropdown, select Variable.
14. Enter API name as ActualDeliveryDate >> Select Data type as Date >> Click on Done.

15. From the Toolbox drag and drop Assignment element.
16. Enter the label as “Assignment”.
17. Set Variable Values:

a) Variable : {!ActualDeliveryDate}

Operator : Equals

Value : {!\$Record.Order_Date_c}

b) Variable : {!ActualDeliveryDate}

Operator : Add

Value : 3

Assignment

* Label	* API Name <small>i</small>	
Assignment	Assignment_1	
Description		

Set Variable Values

Each variable is modified by the operator and value combination.

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

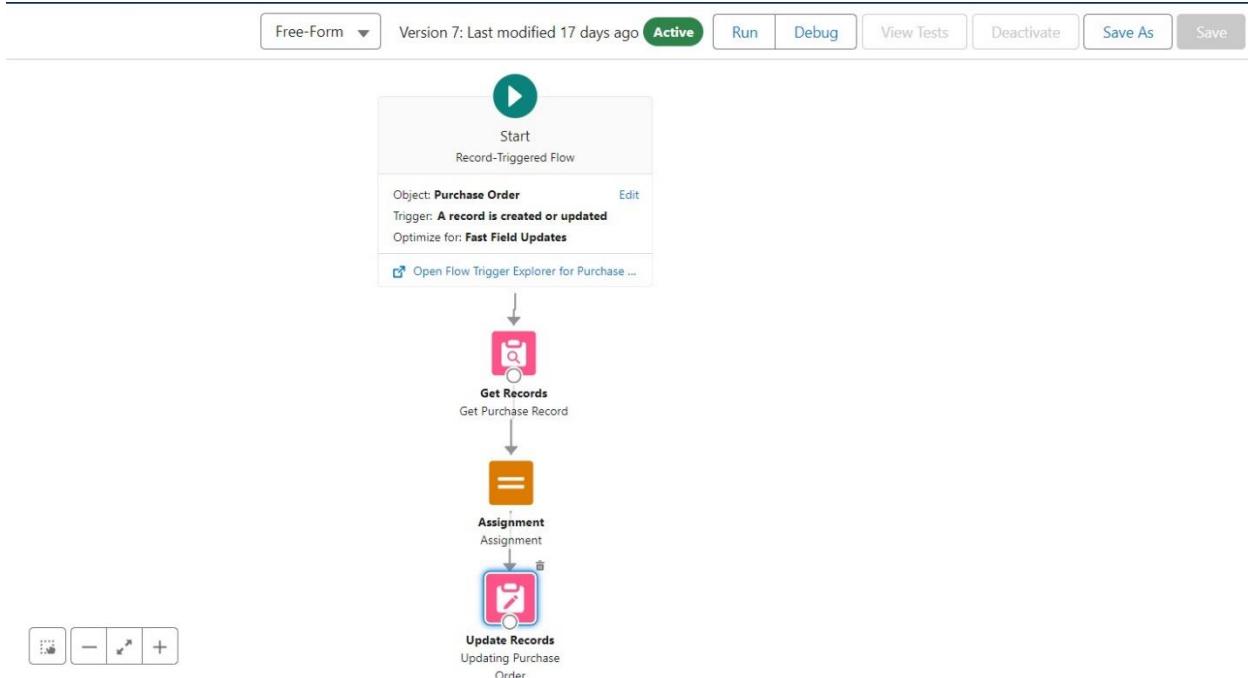
21. How to Find Records to Update and Set Their Values : Use the Purchase Order record that triggered the flow
22. Set Filter Conditions : None -Always Update Record
23. Set Field Values for the Trip Record as

Field : Actual_Delivery_Date__c

Value : {!ActualDeliveryDate}

The screenshot shows the 'Update Records' configuration screen. At the top, there's a section titled 'How to Find Records to Update and Set Their Values' with a note: '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.' Below this, the 'Set Filter Conditions' section is shown, with a dropdown menu set to 'None—Always Update Record'. The final section is 'Set Field Values for the Purchase Order Record', where a field named 'Actual_Delivery_Date__c' is mapped to a value '{!ActualDeliveryDate}'.

24. Click Done
25. Save the flow as “Actual Delivery Date Updating”.
26. Activate the flow.



Triggers

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.

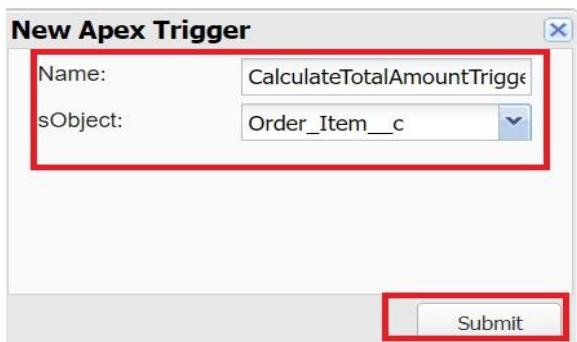
ii) Click on Developer Console: Click on the "Developer Console" option from the Setup menu. This will open the Developer Console in a new browser tab or window.

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 ordItem : newItems) {  
                parentIds.add(ordItem.Purchase_Order_Id__c);  
            }  
        }  
    }  
}
```

```

// For update and delete scenarios

if (isUpdate || isDelete) {

    for (Order_Item__c ordItem : oldItems) {

        parentIds.add(ordItem.Purchase_Order_Id__c);

    }
}

// Calculate the total amounts for affected Purchase Orders

Map<Id, Decimal> purchaseToUpdateMap = new Map<Id, Decimal>();

if (!parentIds.isEmpty()) {

    // Perform an aggregate query to sum the Amount__c for each Purchase
    Order

    List<AggregateResult> aggrList = [
        SELECT Purchase_Order_Id__c, SUM(Amount__c) totalAmount
        FROM Order_Item__c
        WHERE Purchase_Order_Id__c IN :parentIds
        GROUP BY Purchase_Order_Id__c
    ];
}

// Map the result to Purchase Order IDs

for (AggregateResult agrr : aggrList) {

```

```

Id purchaseOrderId = (Id)aggr.get('Purchase_Order_Id_c');

Decimal totalAmount = (Decimal)aggr.get('totalAmount');

purchaseToUpdateMap.put(purchaseOrderId, totalAmount);

}

// Prepare Purchase Order records for update

List<Purchase_Order__c> purchaseToUpdate = new
List<Purchase_Order__c>();

for (Id purchaseOrderId : purchaseToUpdateMap.keySet()) {

    Purchase_Order__c purchaseOrder = new Purchase_Order__c(Id =
purchaseOrderId, Total_Order_cost__c =
purchaseToUpdateMap.get(purchaseOrderId));

    purchaseToUpdate.add(purchaseOrder);

}

// Update Purchase Orders if there are any changes

if (!purchaseToUpdate.isEmpty()) {

    update purchaseToUpdate;

}

}

}

```

Save it.

Reports

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

The screenshot shows the 'Create Report' interface. On the left, there's a sidebar with categories like 'Recently Used' and 'All'. Under 'All', items like 'Accounts & Contacts', 'Opportunities', and 'Contracts and Orders' are listed. In the center, a search bar says 'Select a Report Type' with 'Purchase' typed in. Below it, a list of report types is shown, with 'Purchase Orders' selected. On the right, a panel titled 'Purchase Orders' shows details like 'Standard Report Type' and a 'Start Report' button, which is highlighted with a red box. Other sections like 'Created By You' and 'Created By Others' are also visible.

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

The screenshot shows the 'Filters' section. At the top, there are tabs for 'Outline' and 'Filters', with 'Filters' selected. Below is a search bar with 'Add filter...' and a magnifying glass icon. A large red box highlights a list of filters: 'Show Me All purchase orders' and 'Actual Delivery Date All Time'.

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 configuration screen. The 'Fields' section is expanded, showing 'Groups' and 'Columns'. The 'Groups' section contains 'Supplier ID' and 'Purchase Order: Purchase Order ID', both highlighted with red boxes. The 'Columns' section contains '# Order Count' and '# Total Order Cost', also highlighted with red boxes. The main preview area shows a table with the following data:

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

At the top right, the 'Save & Run' button is highlighted with a red box. At the bottom right, the 'Update Preview Automatically' checkbox is checked and highlighted with a red box. Other buttons like 'Add Chart', 'Save', 'Run', and 'Close' are also visible.

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.

Medical Inventory ... Products Purchase Orders Order Items Inventory Transactions Suppliers Reports Dashboards

Report: Purchase Orders
Purchase Orders based on Suppliers

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

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

Row Counts Detail Rows Subtotals Grand Total

Medical Inventory ... Products Order Items Inventory Transactions Suppliers Reports Dashboards

Reports Recent 3 items

Report Name	Description	Folder	Created By	Created On	Subscribed
Purchase Orders based on Suppliers		Private Reports	Dharshana L	13/9/2025, 2:55 pm	
Complete Purchase Details Report		Private Reports	Dharshana L	13/9/2025, 3:15 pm	
Sample Flow Report: Screen Flows	Which flows run, what's the status of each interview, and how long do users take to complete the screens?	Public Reports	Automated Process	18/8/2025, 12:50 pm	

RECENT REPORTS

- Created by Me
- Private Reports
- Public Reports
- All Reports

FOLDERS

 - All Folders
 - Created by Me
 - Shared with Me

FAVORITES

 - All Favorites

Activate Windows
Go to Settings to activate Windows.

Windows 10 32-bit | 32°C, Mostly sunny | 14:18 | ENG | 14-09-2025

The screenshot shows a Salesforce report interface. At the top, there's a navigation bar with links for Medical Inventory, Products, Order Items, Inventory Transactions, Suppliers, Reports, and Dashboards. The main title is "Report: Purchase Orders" and the specific report is "Purchase Orders based on Suppliers". A search bar is at the top right.

The report displays a summary table with columns: Supplier ID, Purchase Order: Purchase Order ID, Order Count, Total Order Cost, and Total. It lists four suppliers: PR001, PR002, PR003, and PR004, each with a record count of 1 and a total cost of 135.

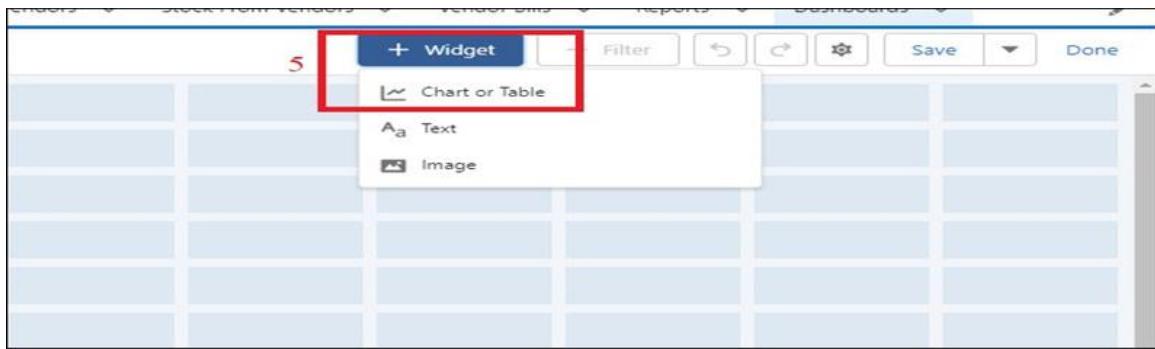
Below this is a detailed table with columns: Purchase Order: ID, Actual Delivery Date, Expected Delivery Date, Order Date, Purchase Order ID, Purchase Order: Owner Name, Purchase Order: Owner Alias, Purchase Order: Owner Role, Purchase Order: Created By, Purchase Order: Created Alias, Purchase Order: Created Date, and Purchase Order: Status. The table contains five rows of data, all belonging to Dharshana L.

At the bottom of the report, there are buttons for Row Counts, Detail Rows, Subtotals, Grand Total, and Stacked Summaries. The system status bar at the bottom right shows the date as 14-09-2025, time as 14:19, and weather as 32°C Mostly sunny.

Dashboards

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.



Select Report

Reports

- Recent
- Created by Me
- Private Reports
- Public Reports
- All Reports

Folders

- Created by Me
- Shared with Me
- All Folders

Select Report

Reports and Folders ▾

All Folders > Private Reports

Complete Purchase Details Report
Annapurna Gurram - 08-Jul-2024, 11:58 am · Private Reports

Purchase Orders based on Suppliers
Annapurna Gurram - 08-Jul-2024, 11:32 am · Private Reports

Cancel
Select

Add Widget

Report

Purchase Orders based on Supplier X

Use chart settings from report i

Display As

Value

Sum of Total Order Cost

Sliced By

Supplier ID

Display Units

Preview

Purchase Orders based on Suppliers

Sum of Total Order Cost

₹26k

₹4.5k

Supplier ID

Supplier-001

Supplier-002

[View Report \(Purchase Orders based on Suppliers\)](#)

Cancel
Add

Add Widget

Title
Purchase Orders based on Suppliers

Subtitle

Footer

Legend Position
Right

Widget Theme
 Light (Dashboard default)

 Dark


Preview

Purchase Orders based on Suppliers

Sum of Total Order Cost



₹26k

₹4.5k

₹22k

Supplier ID
Supplier-001 ●
Supplier-002 ●

[View Report \(Purchase Orders based on Suppliers\)](#)

Cancel
Add

FUNCTIONAL AND PERFORMANCE TESTING

- Tested validation rules by attempting invalid inputs.
- Verified trigger functionality with duplicate product entries.
- Confirmed flows run automatically on stock and expiry events.
- Validated approval processes with email notifications.

RESULTS

- Tabs displayed for Supplier, Product, Purchase Order, Transaction.
- Email alerts for approvals, rejections, and expiry reminders.
- Trigger error messages shown on duplicate entries.
- Flow executions successfully performed.

lcom3-dev-ed.lightning.force.com/lightning/r/Report/00Od200000B3HM9EAN/view?queryScope=userFolders

Medical Inventory ... Products Order Items Inventory Transactions Suppliers Reports Dashboards

Report: Purchase Orders
Purchase Orders based on Suppliers

Total Records 4

Supplier ID	Purchase Order: Purchase Order ID	Order Count	Total Order Cost	Total
PR001	PR001	0	0	1
PR002	PR002	1	0	1
PR003	PR003	1	0	1
PR001	PR001	1	0	1
Total		Record Count	3	1
				4

Details (4 Rows) Click an intersection in the table above to filter details.

Purchase Order: ID	Actual Delivery Date	Expected Delivery Date	Order Date	Purchase Order ID	Purchase Order: Owner Name	Purchase Order: Owner Alias	Purchase Order: Owner Role	Purchase Order: Created By	Purchase Order: Created Alias	Purchase Order: Created Date	Purchase Order: Last Modified By
1 a0Ad2000002gjTJ	12/09/2025	15/09/2025	09/09/2025	PR002	Dharshana L	DL	-	Dharshana L	DL	14/09/2025	Dharshan
2 a0Ad2000002gjRh	15/09/2025	16/09/2025	10/09/2025	-	Dharshana L	DL	-	Dharshana L	DL	14/09/2025	Dharshan
3 a0Ad2000002gjUv	12/09/2025	-	09/09/2025	-	Dharshana L	DL	-	Dharshana L	DL	14/09/2025	Dharshan
4 a0Ad2000002gjUR	12/09/2025	-	09/09/2025	-	Dharshana L	DL	-	Dharshana L	DL	14/09/2025	Dharshan
5											

Activate Windows
Go to Settings to activate Windows.

Row Counts Detail Rows Subtotal Grand Total Stacked Summaries

Windows Taskbar: Microsoft Edge, File Explorer, Control Panel, Task View, Start, Taskbar Icons, System tray: 32°C Mostly sunny, ENG, 14:19, 14-09-2025, battery icon

lcom3-dev-ed.lightning.force.com/lightning/r/Dashboard/01Zd2000003T63VEAS/view?queryScope=userFolders

Medical Inventory ... Products Order Items Inventory Transactions Suppliers Reports Dashboards

Dashboard Medical Inventory Dashboard

As of 14-Sept-2025, 11:55 am Viewing as Dharshana L

Refresh Edit Subscribe

Purchase Orders based on Suppliers

Record Count: 4

Supplier ID: Dharshana Lakshmanasamy

View Report (Purchase Orders based on Suppliers)

As of 14-Sept-2025, 11:55 am

Complete Purchase Details Report

Sum of Order Count: 1

Supplier ID: Dharshana Lakshmanasamy

View Report (Complete Purchase Details Report)

As of 14-Sept-2025, 11:55 am

Activate Windows
Go to Settings to activate Windows.

Windows Taskbar: Microsoft Edge, File Explorer, Control Panel, Task View, Start, Taskbar Icons, System tray: 32°C Mostly sunny, ENG, 14:24, 14-09-2025, battery icon

Advantages:

- Streamlines medical inventory processes.
- Reduces manual errors.
- Provides real-time alerts and reports.
- Improves decision-making.

Disadvantages:

- Requires Salesforce expertise for setup.
- Internet dependency.
- Licensing cost for enterprise-level usage.

CONCLUSION

The **Medical Inventory Management System** built on Salesforce effectively automates medical inventory operations. By integrating supplier management, product tracking, purchase order workflows, and automated alerts, the system improves accuracy, reduces manual effort, and supports better organizational efficiency.

APPENDIX

Trigger (Prevent Duplicate Products)

```
trigger PreventDuplicateProducts on Product__c (before insert) {  
    Set<String> existingProducts = new Set<String>();  
    for (Product__c prod : [SELECT Name FROM Product__c]) {  
        existingProducts.add(prod.Name);  
    }  
    for (Product__c newProd : Trigger.new) {  
        if (existingProducts.contains(newProd.Name)) {  
            newProd.addError('This product already exists in inventory.');//  
        }  
    }  
}
```

```
}
```

Scheduler (Monthly Inventory Report)

```
global class MonthlyInventoryReport implements Schedulable {  
    global void execute(SchedulableContext sc) {  
        sendInventoryReport();  
    }  
  
    public static void sendInventoryReport() {  
        List<Product__c> products = [SELECT Name, Quantity__c, Expiry_Date__c FROM Product__c];  
  
        String report = 'Monthly Inventory Report:\n\n';  
  
        for (Product__c p : products) {  
            report += 'Product: ' + p.Name + ', Quantity: ' + p.Quantity__c + ', Expiry: ' + p.Expiry_Date__c +  
            '\n';  
        }  
  
        Messaging.SingleEmailMessage email = new Messaging.SingleEmailMessage();  
  
        email.setToAddresses(new String[]{'admin@hospital.com'});  
  
        email.setSubject('Monthly Inventory Report');  
  
        email.setPlainTextBody(report);  
  
        Messaging.sendEmail(new Messaging.SingleEmailMessage[]{email});  
    }  
}
```

