

Medical inventory management

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Milestone 1-Salesforce Account

Introduction:

Are you new to Salesforce? Not sure exactly what it is, or how to use it? Don't know where you should start on your learning journey? If you've answered yes to any of these questions, then you're in the right place. This module is for you.

Welcome to Salesforce! Salesforce is game-changing technology, with a host of productivity-boosting features, that will help you sell smarter and faster. As you work toward your badge for this module, we'll take you through these features and answer the question, "What is Salesforce, anyway?".

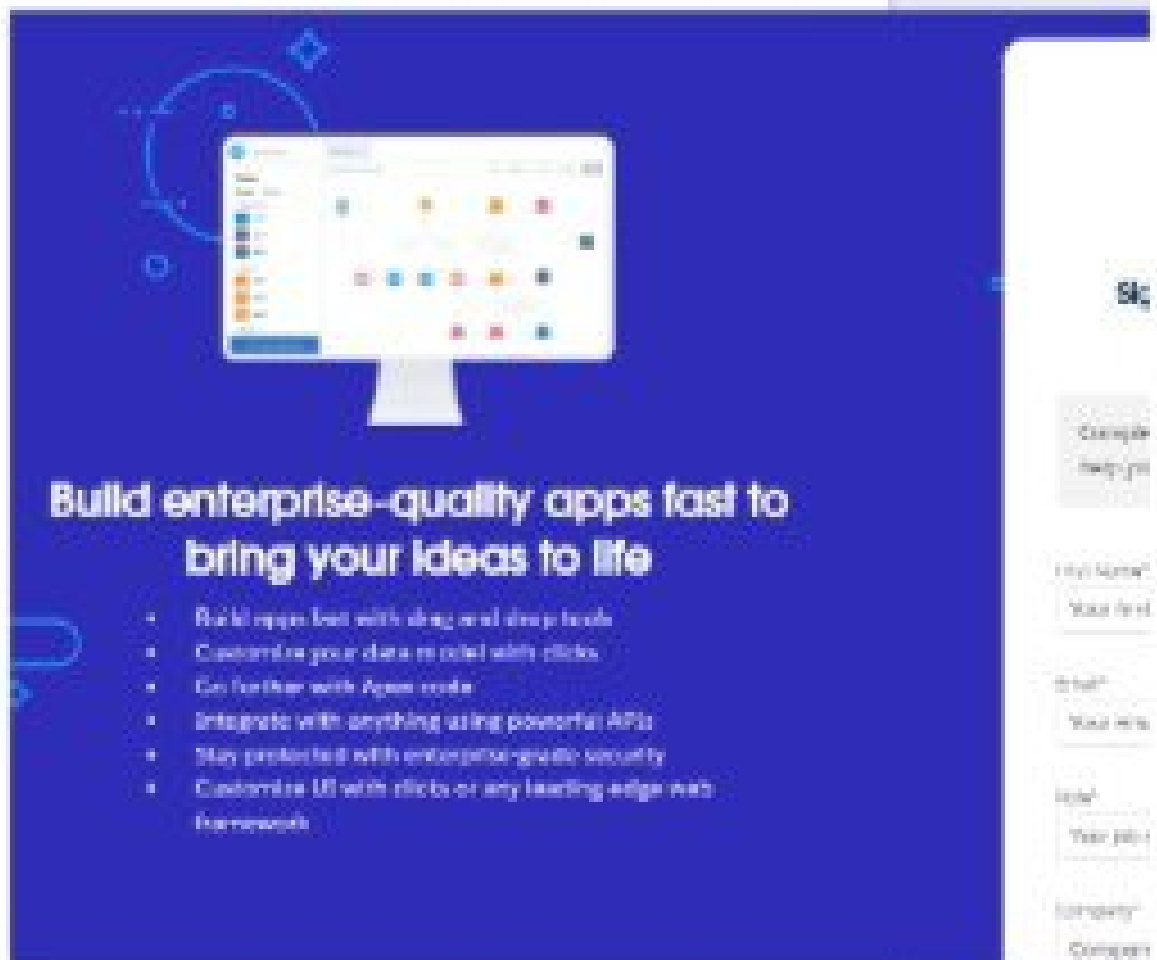
What Is Salesforce?

Salesforce is your customer success platform, designed to help you sell, service, market, analyze, and connect with your customers. Salesforce has everything you need

Developer Account

Creating a developer org in salesforce.

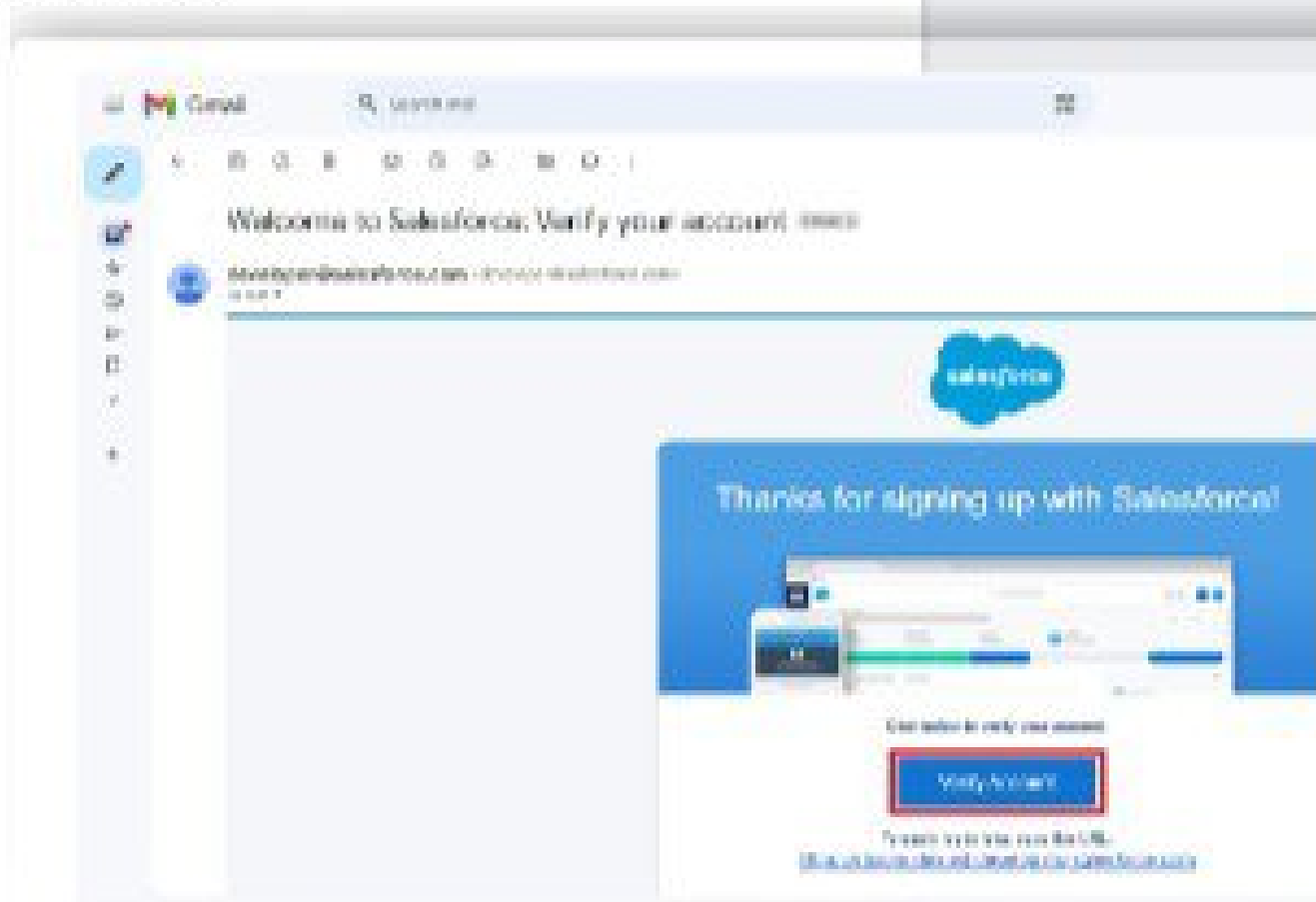
1. Go to <https://developer.salesforce.com/signup>
2. On the sign up form, enter the following details :

The image shows the Salesforce Developer Account sign-up page. It has a dark blue header with the Salesforce logo and navigation links. The main content area is white and features a large illustration of a computer monitor displaying a Salesforce dashboard. Below the illustration, the text reads "Build enterprise-quality apps fast to bring your ideas to life". To the right of this text is a list of bullet points highlighting key features: "Build apps fast with drag-and-drop tools", "Customize your data model with clicks", "Go further with Apex code", "Integrate with anything using powerful APIs", "Stay protected with enterprise-grade security", and "Customize UI with clicks or any leading-edge web framework". On the right side of the form, there are input fields for "First Name*", "Last Name*", "Email*", "Role*", "Company*", and "Country*", each followed by a "Your first" or "Your" placeholder. At the bottom right, there is a "Sign Up" button.

1. First name & Last name
2. Email
3. Role : Developer
4. Company : College Name
5. Country : India
6. Postal Code : pin code
7. Username : should be a combination of your name and company

Activity 2: Account Activation

1. Go to the inbox of the email that you used while signing up. Click on the verify account to activate your account. The email may take 5-10mins.



2. Click on Verify Account
3. Give a password and answer a security question and click on change password.

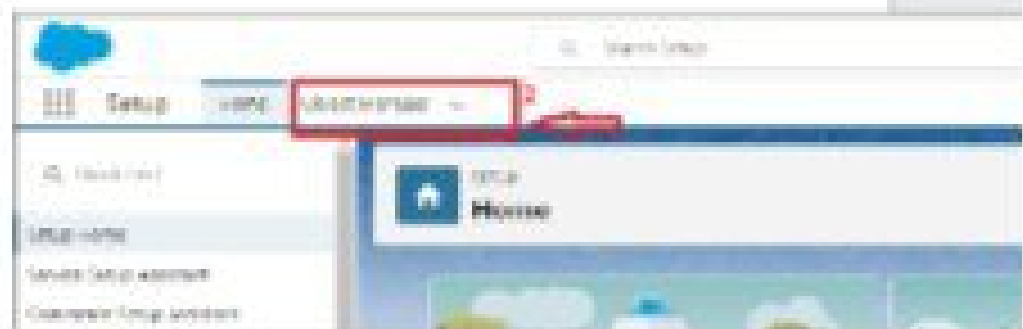
Milestone 2- Objects

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

Activity 1: Creating A Product Object

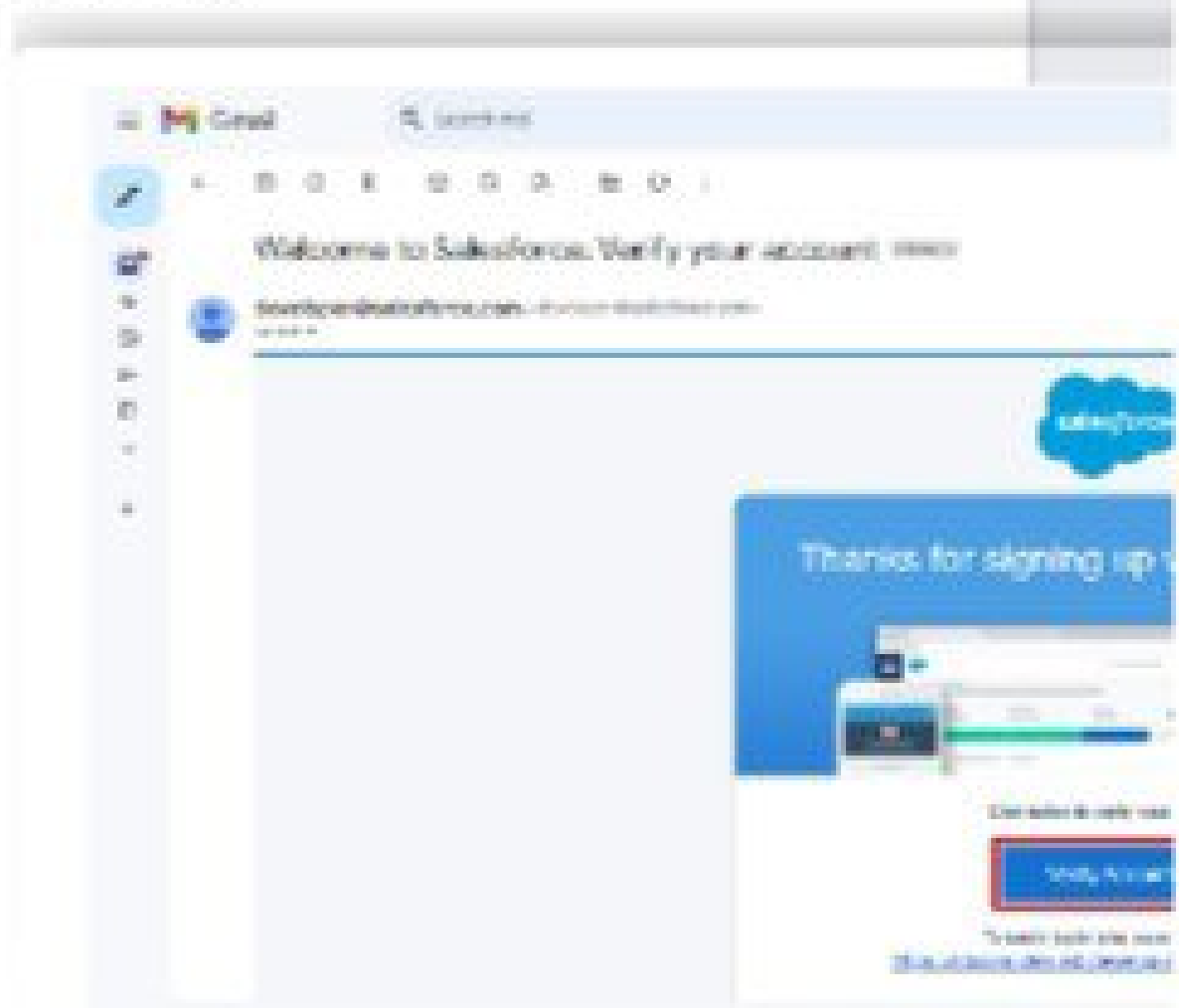
To create an object:

1. From the setup page
2. Click on Object Manager
3. Click on Create >> Click on Custom Object.
4. Enter the label name as Product
5. Enter Plural label name as Products
6. Enter Record Name as Product ID
7. Select Data Type as Text.
8. Select Allow reports.
9. Select Allow search.
10. Click on Save and New



Activity 2: Account Activation

1. Go to the inbox of the email that you used while signing up. Click on the verify account to activate your account. The email may take 5-10mins.



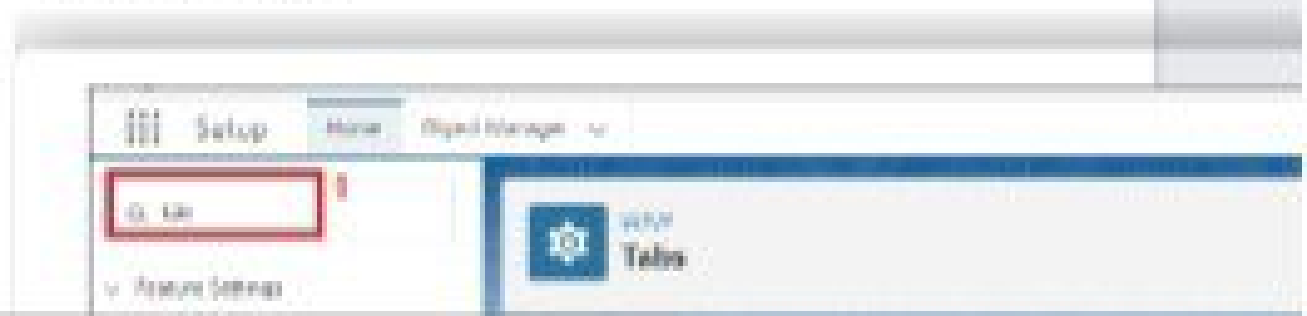
2. Click on Verify Account
3. Give a password and answer a

Milestone 3- Tabs

In Salesforce, tabs are used to make the data stored in objects accessible to users through the user interface. Tabs are a fundamental part of the Salesforce interface, providing a way to navigate to different objects and records.

Activity 1: Creating A Tab For Product Object

1. Go to the setup page >> type Tabs in Quick Find bar
2. Click on tabs
3. Click on New (under custom object tab).
4. Select Object(Product) >> Select the tab style
5. Click on Next >> (Add to profiles page) keep it as default >> Click on Next (Add to Custom App) uncheck the include tab .
6. Make sure that the Append tab to user's existing personal customizations is checked,
7. Click save



Activity 2: Creating Remaining Tabs

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

Milestone 4- The Lightning App

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

Activity 1: Create A Lightning App For Medical Inventory Management

1. From Setup, enter App Manager in the Quick Find and select App Manager.
2. Click New Lightning App.
3. Enter Medical Inventory Management as the App Name >> Click on upload image and add an image related to Medical Inventory then click next
4. Under App Options, leave the default selections and click next.
5. Under Utility Items, leave as is and click Next.
6. From Available Items,

Milestone 5- Fields

Object	Field Name	Data Type
Product	Product ID(Standard)	Text
	Product Name	Text
	Product Description	Text Area
	Minimum Stock Level	Number(18, 0)
	Current Stock Level	Number(18, 0)
	Unit Price	Currency(16, 2)
	Expiry Date	Date
Purchase Order	Purchase Order ID(Standard)	Text
	Supplier ID	Lookup(Supplier)
	Order Date	Date

Activity 1: Creating A Text Field In Product Object

To create fields in an object:

1. Click the gear icon and select Setup. This launches Setup in a new tab.
2. Click the Object Manager tab next to Home.
3. Select Product custom object.
4. Select Fields & Relationships from the left navigation
5. Click on New
6. Select Text field, click Next
7. Enter Field Label as "Product Name" and Length 255.
8. Select Required Field.
9. Click Next, Next, then Save & New.

5. Click on New
6. Select TextArea field, click Next
7. Enter Field Label as "Product Description".
8. Click Next, Next, then Save & New.

<input type="radio"/> Occasion <input type="radio"/> Member <input type="radio"/> Percent <input type="radio"/> Phone <input type="radio"/> Product <input type="radio"/> Product (Multi Select) <input type="radio"/> Text <input checked="" type="radio"/> Text Area 6 <input type="radio"/> Text Area (Long) <input type="radio"/> Text Area (Short) <input type="radio"/> Text Autocomplete <input type="radio"/> Time <input type="radio"/> URL	<p>Always Send as HTML: Help that custom email addresses cannot be blocked, users to define locations. Includes latitude and longitude values.</p> <p>Always asks to enter any number. Leading zeros are ignored.</p> <p>Always asks to enter a percentage number, for example, 10% and not 10.</p> <p>Always asks to enter any phone number. Automatically formats it as a phone number.</p> <p>Always asks to select a value from a list you define.</p> <p>Always asks to select multiple values from a list you define.</p> <p>Always asks to enter any combination of letters and numbers.</p> <p>Always asks to enter up to 255 characters on separate lines.</p> <p>Always asks to enter up to 1024 characters on separate lines.</p> <p>Always asks to enter matched text, addresses and dates, up to 100 characters.</p> <p>Always asks to enter any combination of letters and numbers and no special characters.</p> <p>Always asks to enter a local time. For example, "1:40 PM", "1:40 AM".</p> <p>Always asks to enter any valid website address. When users click on</p>
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Step 2: Enter the details

Field Label:	<input type="text" value="Product Description"/> 7
Field Name:	<input type="text" value="Product Description"/>
Description:	<div></div>
Help Text:	<div></div>
Required:	<input type="checkbox"/> Always require a value in this field in order to save a record
Auto add to contact report type:	<input checked="" type="checkbox"/> Add this field to existing contact report types that contain this field

Product Object

To create fields in an object:

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

Step 2: Enter the Details

Field Label: **Field Type:** ☐ Number **Field Name:**

Please enter the length of the number and the number of decimal places. For example, a number with a length of 10 and 2 decimal places.

Length: **Decimal Places:**

Field Name:

Description:

Help Text:

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

Unique: ☒ Do not allow duplicate values

Indexed: ☒ Set this field as the unique record identifier for an external system

PRODUCT OBJECT

To create fields in an object:

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

Step 3: Enter the details

Field Label 5

Please enter the length of the number and the number of decimal places. For example, a number with a length of 10 and 2 decimal places would be 12345678.90.

6 Length Decimal Places

Field Name 7

Description

Help Text

☒ Required ☐ Display only on a record in this field is used to select a value of

Help Text for custom report type ☐ Add this field to existing custom report types that contain this field