

MEDICAL INVENTORY MANAGEMENT

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College Code: bru36

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1. INTRODUCTION

1.1 Project Overview -

The Medical Inventory Management System is a Salesforce-based application designed to streamline the tracking and management of medicines, medical supplies, and equipment in healthcare organizations such as hospitals, pharmacies, and clinics.

The main objective of this project is to provide a reliable and efficient solution to common challenges like stockouts, expired medicines, and manual errors in inventory handling. By leveraging Salesforce features such as custom objects, relationships, validation rules, flows, Apex triggers, reports, and dashboards, the system ensures that medical inventory is always accurate, up to date, and accessible.

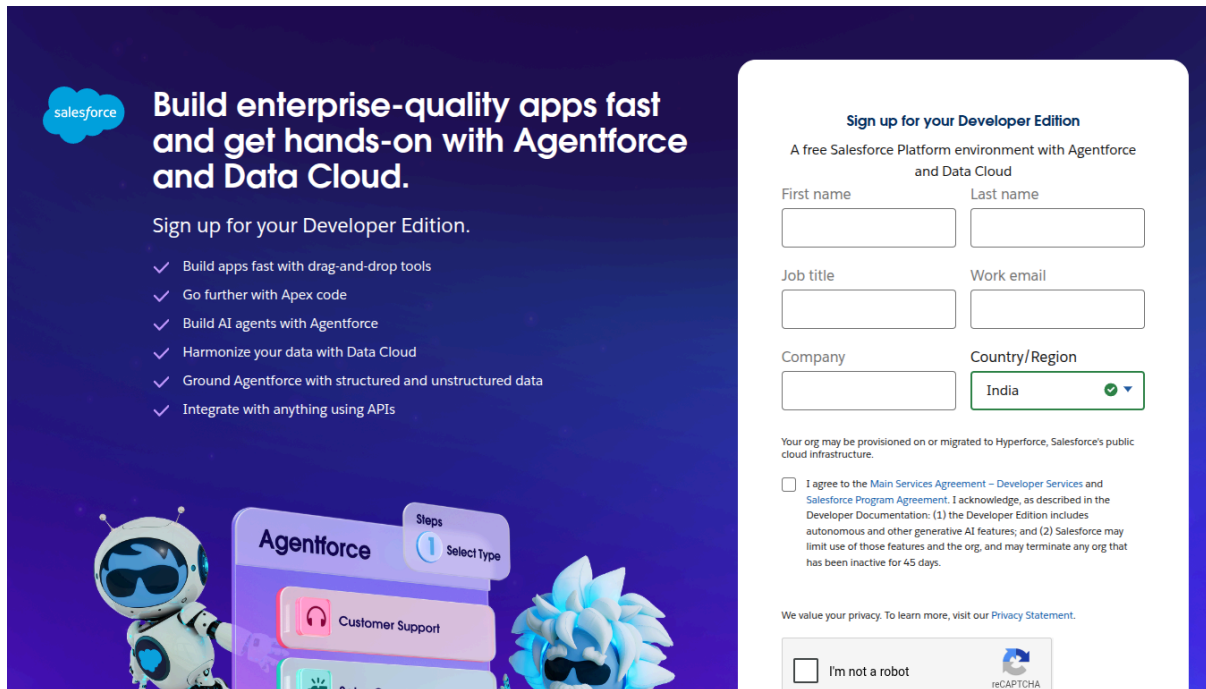
1.2 Purpose -

The purpose of this project is to design and implement a Salesforce-based Medical Inventory Management System that enables efficient monitoring, tracking, and management of medicines and medical supplies within healthcare organizations. The system is intended to address common issues faced in manual inventory handling, such as stock shortages, expired medicines, and data inaccuracy, by providing a centralized and automated solution. By leveraging Salesforce features like custom objects, automation tools, and dashboards, the project ensures that healthcare staff can maintain accurate records, reduce wastage, and make better decisions in real time. Ultimately, the purpose of this project is to improve the overall efficiency and reliability of medical inventory processes, while also demonstrating the flexibility of Salesforce beyond its traditional CRM role.

2. DEVELOPMENT

Creating a developer account : We can create an developers account in salesforce by using the following ur

URL: <https://www.salesforce.com/form/developer-signup/?d=pb>



The image shows the Salesforce Developer Edition signup page. On the left, there's a blue banner 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: building apps with drag-and-drop tools, using Apex code, building AI agents with Agentforce, harmonizing data with Data Cloud, and integrating with APIs. On the right, there's a white form titled "Sign up for your Developer Edition" with a subtitle "A free Salesforce Platform environment with Agentforce and Data Cloud." The form includes fields for First name, Last name, Job title, Work email, Company, and Country/Region (set to India). There's a checkbox for agreeing to the Main Services Agreement and Salesforce Program Agreement, and a reCAPTCHA "I'm not a robot" checkbox at the bottom.

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

Sign up for your Developer Edition.

- ✓ Build apps fast with drag-and-drop tools
- ✓ Go further with Apex code
- ✓ Build AI agents with Agentforce
- ✓ Harmonize your data with Data Cloud
- ✓ Ground Agentforce with structured and unstructured data
- ✓ Integrate with anything using APIs

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

First name Last name

Job title Work email

Company Country/Region

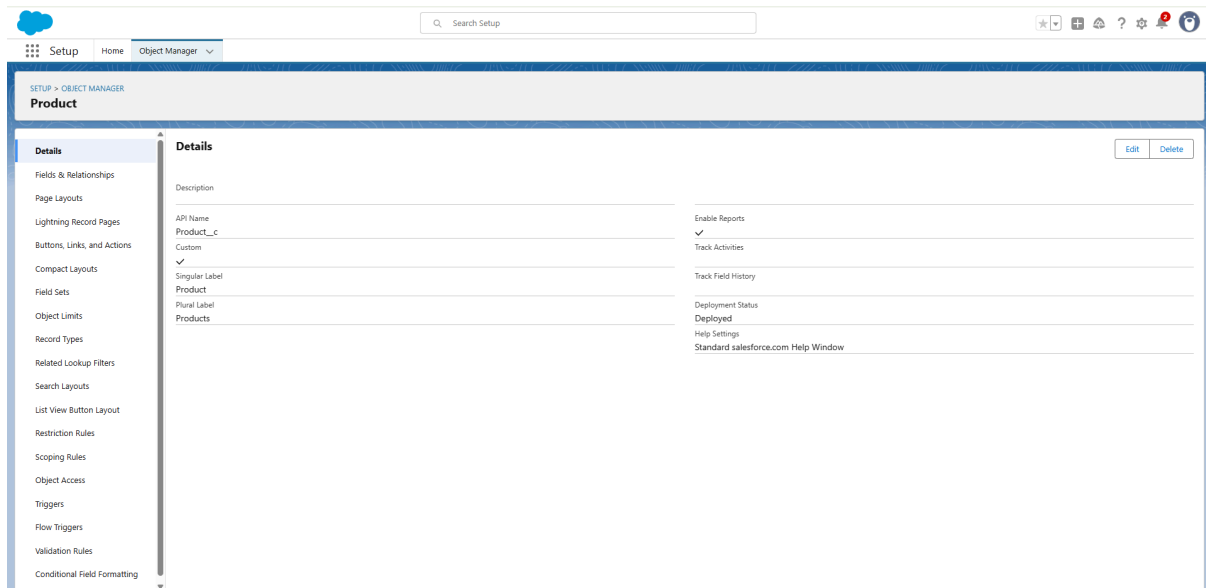
India

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

We value your privacy. To learn more, visit our [Privacy Statement](#).

☐ I'm not a robot

Creating objects:- We created object named Products , Purchase Order, Order Item, Inventory Transaction and Supplier.



The image shows the Salesforce Setup page for the "Product" object. The breadcrumb trail is "SETUP > OBJECT MANAGER". The page title is "Product". On the left, there's a sidebar with a "Details" section containing a list of configuration options: 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. The main content area is titled "Details" and shows the configuration for the "Product" object. It includes fields for API Name (Product__c), Custom (checked), Singular Label (Product), Plural Label (Products), and Description. On the right, there are checkboxes for Enable Reports (checked), Track Activities (checked), and Track Field History. Below these, there's a section for Deployment Status (Deployed), Help Settings, and a link to the Standard Salesforce.com Help Window. At the top right of the main content area, there are "Edit" and "Delete" buttons.

Setup Home Object Manager

Search Setup

SETUP > OBJECT MANAGER

Product

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

Scoping Rules

Object Access

Triggers

Flow Triggers

Validation Rules

Conditional Field Formatting

Details

Description

API Name

Product__c

Custom

✓

Singular Label

Product

Plural Label

Products

Enable Reports

✓

Track Activities

Track Field History


Deployment Status

Deployed








Help Settings

Standard salesforce.com Help Window

Edit Delete



Search Setup



SetupHomeObject 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

Related Lookup Filters

Search Layouts

List View Button Layout

Details

Description

API Name

Purchase_Order__c

Custom

✓

Singular Label

Purchase Order

Plural Label

Purchase Orders

Enable Reports

✓

Track Activities

Track Field History


Deployment Status

Deployed








Help Settings

Standard salesforce.com Help Window

EditDelete



Search Setup



SetupHomeObject 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

Details

Description

API Name

Order_Item__c

Custom

✓

Singular Label

Order Item

Plural Label

Order Items

Enable Reports

✓

Track Activities

Track Field History


Deployment Status

Deployed








Help Settings

Standard salesforce.com Help Window

EditDelete



Q inven



SetupHomeObject 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

Related Lookup Filters

Search Layouts

List View Button Layout

Details

Description

API Name
Inventory_Transaction__c

Custom
✓

Singular Label
Inventory Transaction

Plural Label
Inventory Transactions

Enable Reports
✓


Track Activities

Track Field History








Deployment Status
Deployed

Help Settings
Standard salesforce.com Help Window

EditDelete



Q inven



SetupHomeObject Manager

SETUP > OBJECT MANAGER

Supplier object

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

Details

Description

API Name
Supplier_objects__c

Custom
✓

Singular Label
Supplier object

Plural Label
Supplier objects

Enable Reports
✓

Track Activities

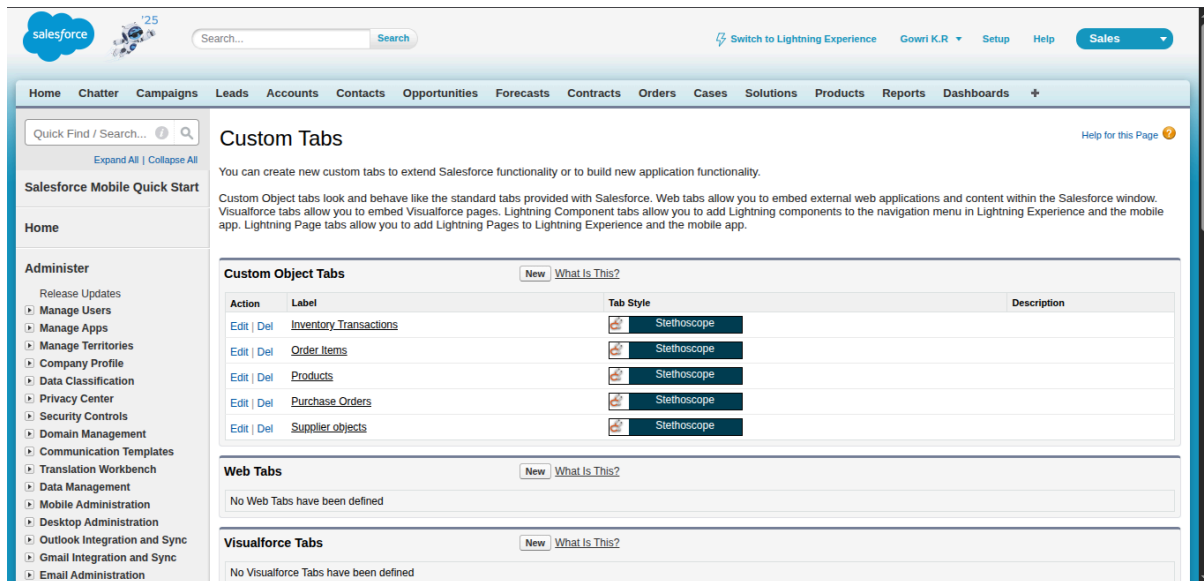
Track Field History

Deployment Status
Deployed

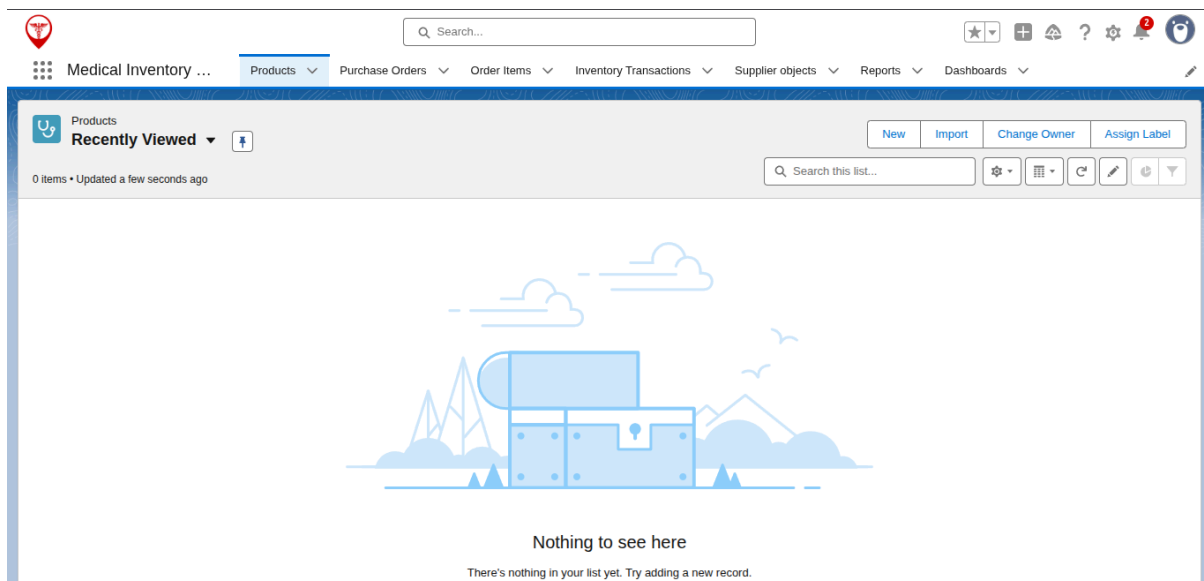
Help Settings
Standard salesforce.com Help Window

EditDelete

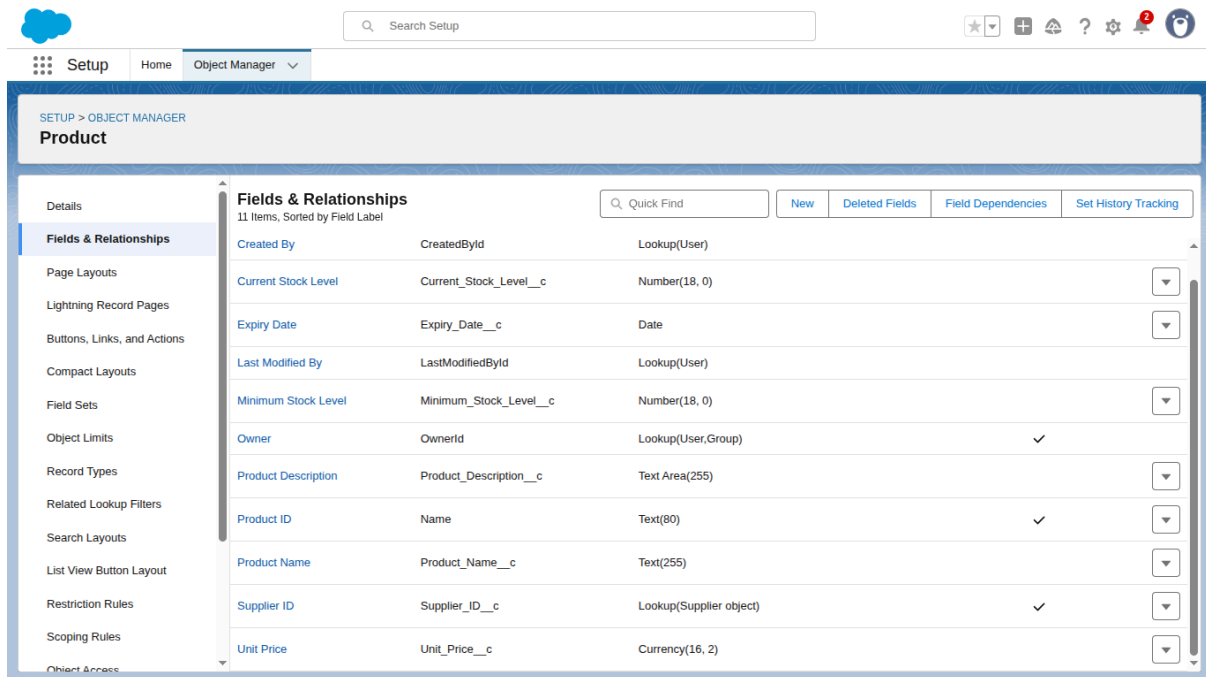
Creating Tabs: - For Tabs, We have created the tabs for the custom made objects Products , Purchase Order, Order Item, Inventory Transaction and Supplier.



Creating the Lightning app: - We developed a Lightning app named ' **Medical Inventory Management** ', which included all the essential items such as Products, Purchase Orders, Order Items, Inventory Transactions, Suppliers, Reports, and Dashboards. The app was configured with the required profiles, including the System Administrator, to ensure proper access and management

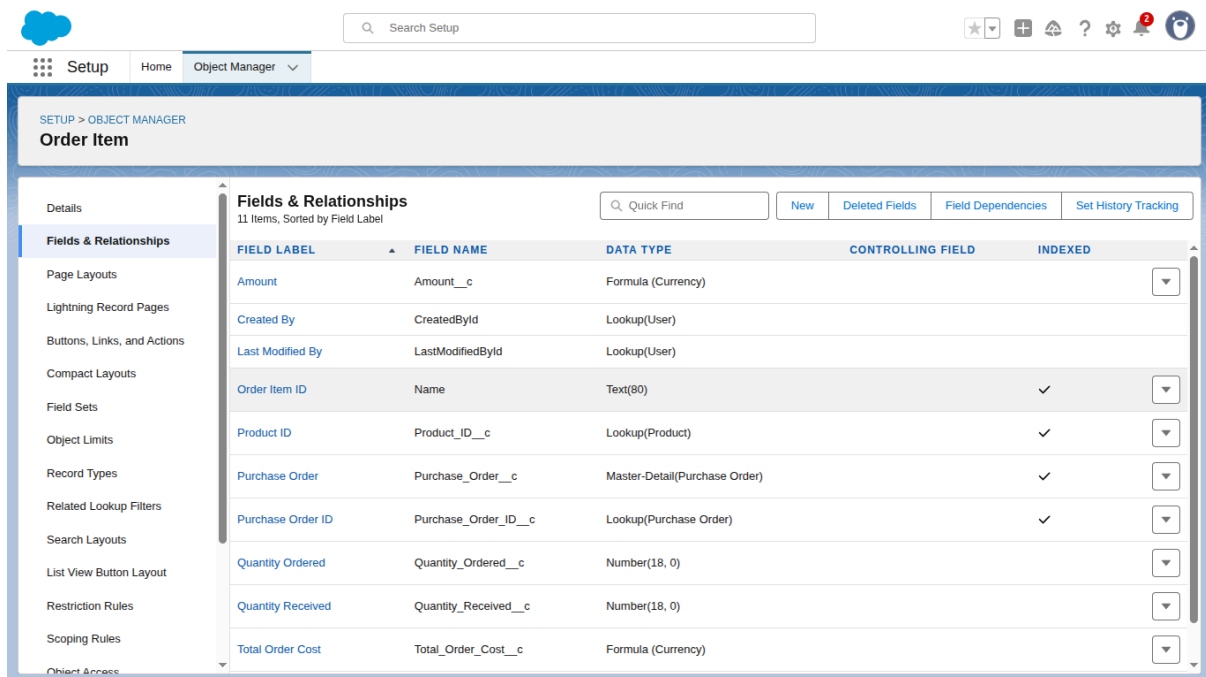


Configuring Fields and Relationship :- We created various fields and relationship for each custom objects.




The screenshot shows the Salesforce Setup interface for the 'Product' object. The left sidebar contains a navigation menu with options like Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Restriction Rules, Scoping Rules, and Object Access. The main content area is titled 'Product' and shows the 'Fields & Relationships' section. It lists 11 items, sorted by Field Label. The fields are as follows:

Field Label	Field Name	Data Type	Controlling Field	Indexed
Created By	CreatedById	Lookup(User)		
Current Stock Level	Current_Stock_Level__c	Number(18, 0)		
Expiry Date	Expiry_Date__c	Date		
Last Modified By	LastModifiedById	Lookup(User)		
Minimum Stock Level	Minimum_Stock_Level__c	Number(18, 0)		
Owner	OwnerId	Lookup(User, Group)	✓	
Product Description	Product_Description__c	Text Area(255)		
Product ID	Name	Text(80)	✓	
Product Name	Product_Name__c	Text(255)		
Supplier ID	Supplier_ID__c	Lookup(Supplier object)	✓	
Unit Price	Unit_Price__c	Currency(16, 2)		










The screenshot shows the Salesforce Setup interface for the 'Order Item' object. The left sidebar contains a navigation menu with options like Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Restriction Rules, Scoping Rules, and Object Access. The main content area is titled 'Order Item' and shows the 'Fields & Relationships' section. It lists 11 items, sorted by Field Label. The fields are as follows:

Field Label	Field Name	Data Type	Controlling Field	Indexed
Amount	Amount__c	Formula (Currency)		
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Order Item ID	Name	Text(80)		✓
Product ID	Product_ID__c	Lookup(Product)		✓
Purchase Order	Purchase_Order__c	Master-Detail(Purchase Order)		✓
Purchase Order ID	Purchase_Order_ID__c	Lookup(Purchase Order)		✓
Quantity Ordered	Quantity_Ordered__c	Number(18, 0)		
Quantity Received	Quantity_Received__c	Number(18, 0)		
Total Order Cost	Total_Order_Cost__c	Formula (Currency)		



Q Search Setup



SetupHomeObject Manager

SETUP > OBJECT MANAGER

Inventory Transaction


DetailsFields & RelationshipsPage LayoutsLightning Record PagesButtons, Links, and ActionsCompact LayoutsField SetsObject LimitsRecord TypesRelated Lookup FiltersSearch LayoutsList View Button LayoutRestriction RulesScoping RulesObject Access

Fields & Relationships8 Items, Sorted by Field Label








Q Quick Find

NewDeleted FieldsField DependenciesSet History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Inventory Transaction ID	Name	Text(80)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Purchase Order ID	Purchase_Order_ID__c	Number(18, 0)		
Total Order Cost	Total_Order_Cost__c	Number(18, 0)		
Transaction Date	Transaction_Date__c	Date		
Transaction Type	Transaction_Type__c	Picklist		



Q Search Setup



SetupHomeObject Manager

SETUP > OBJECT MANAGER

Purchase Order

DetailsFields & RelationshipsPage LayoutsLightning Record PagesButtons, Links, and ActionsCompact LayoutsField SetsObject LimitsRecord TypesRelated Lookup FiltersSearch LayoutsList View Button LayoutRestriction RulesScoping RulesObject Access

Fields & Relationships11 Items, Sorted by Field Label

Q Quick Find

NewDeleted FieldsField DependenciesSet History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Actual Delivery Date	Actual_Delivery_Date__c	Date		
Created By	CreatedById	Lookup(User)		
Expected Delivery Date	Expected_Delivery_Date__c	Date		
Last Modified By	LastModifiedById	Lookup(User)		
Order Count	Order_Count__c	Roll-Up Summary (COUNT Order Item)		
Order Date	Order_Date__c	Date		
Owner	OwnerId	Lookup(User,Group)		✓
Purchase Order	Purchase_Order__c	Lookup(Purchase Order)		✓
Purchase Order ID	Name	Text(80)		✓
Supplier ID	Supplier_ID__c	Text(100)		

Setup > OBJECT MANAGER

Supplier object

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

Fields & Relationships

9 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Address	Address__c	Text(100)		
Contact Person	Contact_Person__c	Text(100)		
Created By	CreatedById	Lookup(User)		
Email	Email__c	Email		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Phone Number	Phone_Number__c	Phone		
Supplier Name	Supplier_Name__c	Text(100)		
Supplier objects ID	Name	Text(80)		✓

Setup of the Page Layout:- We edited the Page Layout for the custom objects.

salesforce

Search...

Switch to Lightning Experience

Gowri K.R. Setup Help Sales

Home Chatter Campaigns Leads Accounts Contacts Opportunities Forecasts Contracts Orders Cases Solutions Products Reports Dashboards

Quick Find / Search...

Expand All Collapse All

Salesforce Mobile Quick Start

Home

Administer

- Release Updates
- Manage Users
- Manage Apps
- Manage Territories
- Company Profile
- Data Classification
- Privacy Center
- Security Controls
- Domain Management
- Communication Templates
- Translation Workbench
- Data Management
- Mobile Administration
- Desktop Administration
- Outlook Integration and Sync
- Gmail Integration and Sync
- Email Administration

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

Quick Find Field Name

Section Expiry Date Product Description Unit Price

Blank Space Last Modified By Product ID

Created By Minimum Stock Level Product Name

Current Stock Level Owner Supplier ID

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

salesforce

25

Search...

Search

Switch to Lightning Experience

Gowri K.R

Setup

Help

Sales

HomeChatterCampaignsLeadsAccountsContactsOpportunitiesForecastsContractsOrdersCasesSolutionsProductsReportsDashboards

Quick Find / Search...

Expand All | Collapse All

Salesforce Mobile Quick Start

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Order Item Layout

Mini Page LayoutMini Console ViewVideo TutorialHelp for this Page

SaveQuick SavePreview As...CancelUndoRedoLayout Properties

Fields

ButtonsQuick ActionsMobile & Lightning ActionsExpanded LookupsRelated Lists

Quick FindField Name

Section	Last Modified By	Purchase Order ID	Unit Price
Blank Space	Order Item ID	Quantity Ordered	
Amount	Product ID	Quantity Received	
Created By	Purchase Order	Total Order Cost	

Order Item 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

salesforce

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Search...

Search

Switch to Lightning Experience

Gowri K.R

Setup

Help

Sales

HomeChatterCampaignsLeadsAccountsContactsOpportunitiesForecastsContractsOrdersCasesSolutionsProductsReportsDashboards

Quick Find / Search...

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Inventory Transaction Layout

Mini Page LayoutMini Console ViewVideo TutorialHelp for this Page

SaveQuick SavePreview As...CancelUndoRedoLayout Properties

Fields

ButtonsQuick ActionsMobile & Lightning ActionsExpanded LookupsRelated Lists

Quick FindField Name

Section	Last Modified By	Transaction Date
Blank Space	Owner	Transaction Type
Created By	Purchase Order ID	
Inventory Transac...	Total Order Cost	

Inventory Transaction Sample

Highlights Panel

Customize the highlights panel for this page layout...

Quick Actions in the Salesforce Classic

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Salesforce Mobile and Lightning Experience

Actions

salesforce

25

Search...

Search

Switch to Lightning Experience

Gowri K.R

Setup

Help

Sales

HomeChatterCampaignsLeadsAccountsContactsOpportunitiesForecastsContractsOrdersCasesSolutionsProductsReportsDashboards

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Purchase Order Layout

Mini Page LayoutMini Console ViewVideo TutorialHelp for this Page

SaveQuick SavePreview As...CancelUndoRedoLayout Properties

Fields

Buttons

Quick Actions

Mobile & Lightning Actions

Expanded Lookups

Related Lists

Quick Find

Field Name

SectionExpected Delivery...OwnerTotal Order Cost

Blank SpaceLast Modified ByPurchase Order

Actual Delivery DateOrder CountPurchase Order ID

Created ByOrder DateSupplier ID

Purchase Order 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

salesforce

25

Search...

Search

Switch to Lightning Experience

Gowri K.R

Setup

Help

Sales

HomeChatterCampaignsLeadsAccountsContactsOpportunitiesForecastsContractsOrdersCasesSolutionsProductsReportsDashboards

Quick Find / Search...

Expand All | Collapse All

Salesforce Mobile Quick Start

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Administer

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Order Item Layout

Mini Page LayoutMini Console ViewVideo TutorialHelp for this Page

SaveQuick SavePreview As...CancelUndoRedoLayout Properties

Fields

Buttons

Quick Actions

Mobile & Lightning Actions

Expanded Lookups

Related Lists

Quick Find

Field Name

SectionLast Modified ByPurchase Order IDUnit Price

Blank SpaceOrder Item IDQuantity Ordered

AmountProduct IDQuantity Received

Created ByPurchase OrderTotal Order Cost

Order Item Sample

Highlights Panel

Customize the highlights panel for this page layout...

Quick Actions in the Salesforce Classic

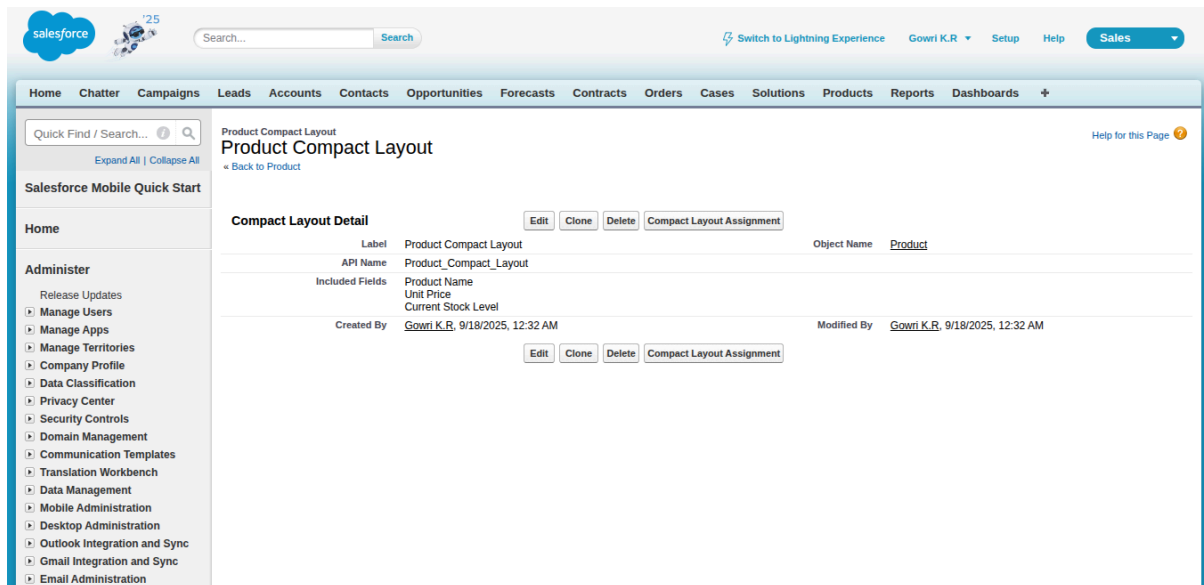
Publisher

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

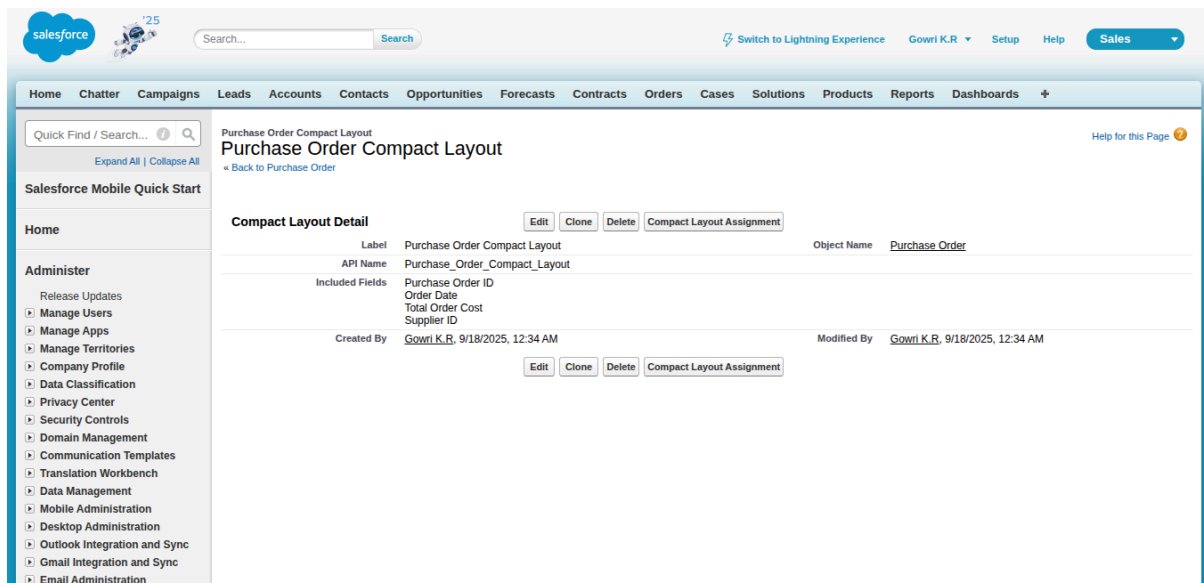
Actions

Compact Layout:- We created Compact Layout for the Custom object Product and Purchase Order.



This screenshot shows the Salesforce Compact Layout configuration for the 'Product' object. The interface includes a top navigation bar with the Salesforce logo, a search bar, and a 'Switch to Lightning Experience' button. The left sidebar contains navigation links for Home, Chatter, Campaigns, and various administrative tools. The main content area displays the 'Product Compact Layout' configuration. It includes a 'Compact Layout Detail' section with buttons for 'Edit', 'Clone', 'Delete', and 'Compact Layout Assignment'. The configuration details are as follows:

Field	Value
Label	Product Compact Layout
API Name	Product_Compact_Layout
Object Name	Product
Included Fields	Product Name Unit Price Current Stock Level
Created By	Gowri K.R. 9/18/2025, 12:32 AM
Modified By	Gowri K.R. 9/18/2025, 12:32 AM



This screenshot shows the Salesforce Compact Layout configuration for the 'Purchase Order' object. The interface is similar to the previous one, with the same top navigation bar and left sidebar. The main content area displays the 'Purchase Order Compact Layout' configuration. It includes a 'Compact Layout Detail' section with buttons for 'Edit', 'Clone', 'Delete', and 'Compact Layout Assignment'. The configuration details are as follows:

Field	Value
Label	Purchase Order Compact Layout
API Name	Purchase_Order_Compact_Layout
Object Name	Purchase Order
Included Fields	Purchase Order ID Order Date Total Order Cost Supplier ID
Created By	Gowri K.R. 9/18/2025, 12:34 AM
Modified By	Gowri K.R. 9/18/2025, 12:34 AM

Profiles:- We created Profiles named Inventory Manager and Purchase Manager.

The screenshot shows the Salesforce 'Purchase Manager' profile page. The left sidebar contains navigation links for Home, Administer, and Manage Users. The main content area displays the profile details, including the name 'Purchase Manager', user license 'Salesforce', and creation/modification dates. Below the profile details, there is a section for 'Page Layouts' showing various layouts assigned to the profile, such as 'Global Layout', 'Email Application', 'Home Page Layout', and 'Account Layout'.

Profile Detail

Name	Purchase Manager
User License	Salesforce
Description	
Created By	Gowri K.R., 9/18/2025, 2:02 AM
Modified By	Gowri K.R., 9/18/2025, 2:05 AM

Page Layouts

Standard Object Layouts	Global	Global Layout	Location Group Assignment	Location Group Assignment Layout
Email Application	Not Assigned	View Assignment	Macro	Macro Layout
Home Page Layout	Home Page Default	View Assignment	Object Milestone	Object Milestone Layout
Account	Account Layout	View Assignment	Operating Hours	Operating Hours Layout

Permission Sets:- We created Permission set for the Medical Inventory

The screenshot shows the Salesforce 'Purchase Manager Create Access' permission set page. The left sidebar contains navigation links for Home, Administer, and Manage Users. The main content area displays the permission set overview, including the API Name 'Purchase_Manager_Create_Access', namespace prefix, and creation/modification dates. Below the overview, there is a section for 'Apps' showing various settings and permissions assigned to the permission set, such as 'Assigned Apps', 'Assigned Connected Apps', 'Object Settings', 'App Permissions', 'Apex Class Access', and 'Visualforce Page Access'.

Permission Set Overview

Description	API Name	Purchase_Manager_Create_Access
License	Namespace Prefix	
Session Activation Required	Created By	Gowri K.R., 9/18/2025, 2:21 AM
Permission Set Groups Added To	Last Modified By	Gowri K.R., 9/18/2025, 2:24 AM

Apps

Settings that apply to Salesforce apps, such as Sales, and custom apps built on the Lightning Platform

Assigned Apps
Settings that specify which apps are visible in the app menu

Assigned Connected Apps
Settings that specify which connected apps are visible in the app menu

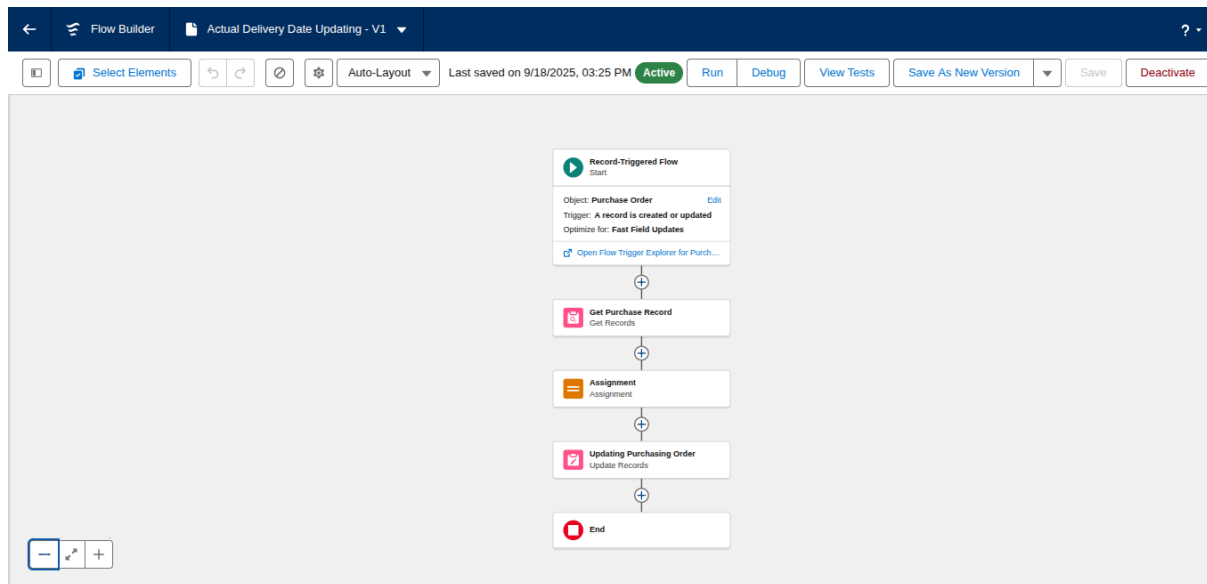
Object Settings
Permissions to access objects and fields, and settings such as tab availability

App Permissions
Permissions to perform app-specific actions, such as "Manage Call Centers"

Apex Class Access
Permissions to execute Apex classes

Visualforce Page Access
Permissions to execute Visualforce pages

Flows:- We created flow named Actual Delivery Date Update to update the actual delivery date.



Apex Triggers:- We created the trigger to calculate the Total amount on Order item.

The screenshot shows the Salesforce Apex Trigger detail page for the 'CalculateTotalAmountTrigger'. The trigger is an Apex Trigger on the 'Order Item' object, triggered by 'after insert, after update, after delete, after undelete'. The trigger is currently in an 'Active' state.

Apex Trigger Detail

Name	CalculateTotalAmountTrigger	sObject Type	Order Item
Code Coverage	0% (0/1)	Status	Active
Created By	Gowri K.R.	Last Modified By	Gowri K.R.
Created Date	9/18/2025, 7:41 AM	Last Modified Date	9/18/2025, 8:15 AM
Namespace Prefix			

Apex Trigger

```
1 trigger CalculateTotalAmountTrigger on Order_Item__c (after insert, after update, after delete, after undelete) {
2
3   // Call the handler class to handle the logic
4
5   CalculateTotalAmountHandler.calculateTotal(trigger.new, trigger.old, trigger.isInsert, trigger.isUpdate, trigger.isDelete, trigger.isUndelete);
6
7 }
```

Apex Classes:- We created Apex Handler class.

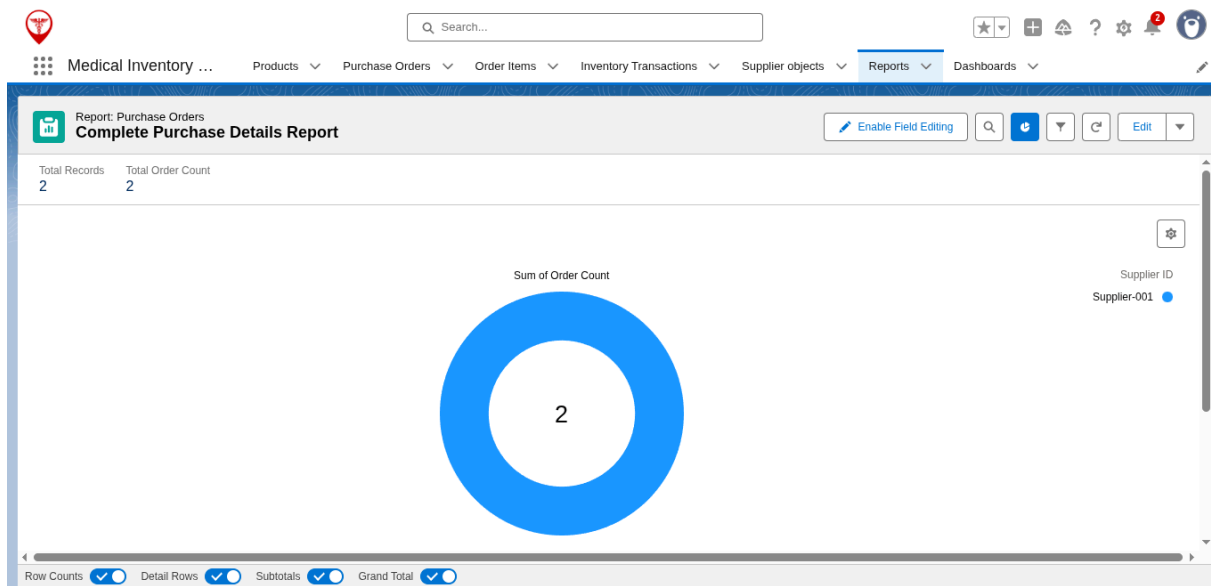
The screenshot shows the Salesforce interface for an Apex Class. The class name is 'CalculateTotalAmountHandler'. It is an active class with 0% code coverage (0/22). The class was created by Gowri K.R. on 9/18/2025 at 8:15 AM. The class body is displayed, showing a public class definition and a static method 'calculateTotal' that takes a list of Order_Item__c and returns a list of Order_Item__c. The method includes comments and logic for calculating the total amount for Purchase Orders based on related Order Items.

```
1 public class CalculateTotalAmountHandler {
2
3
4
5 // Method to calculate the total amount for Purchase Orders based on related Order Items
6
7 public static void calculateTotal(List<Order_Item__c> newItems, List<Order_Item__c> oldItems, Boolean isInsert, Boolean isUpdate, Boolean isDelete, Boolean isUndelete) {
8
9
10
11 // Collect Purchase Order IDs affected by changes in Order_Item__c records
12
13 Set<Id> parentIds = new Set<Id>();
14
15
16
17 // For insert, update, and undelete scenarios
18 }
```

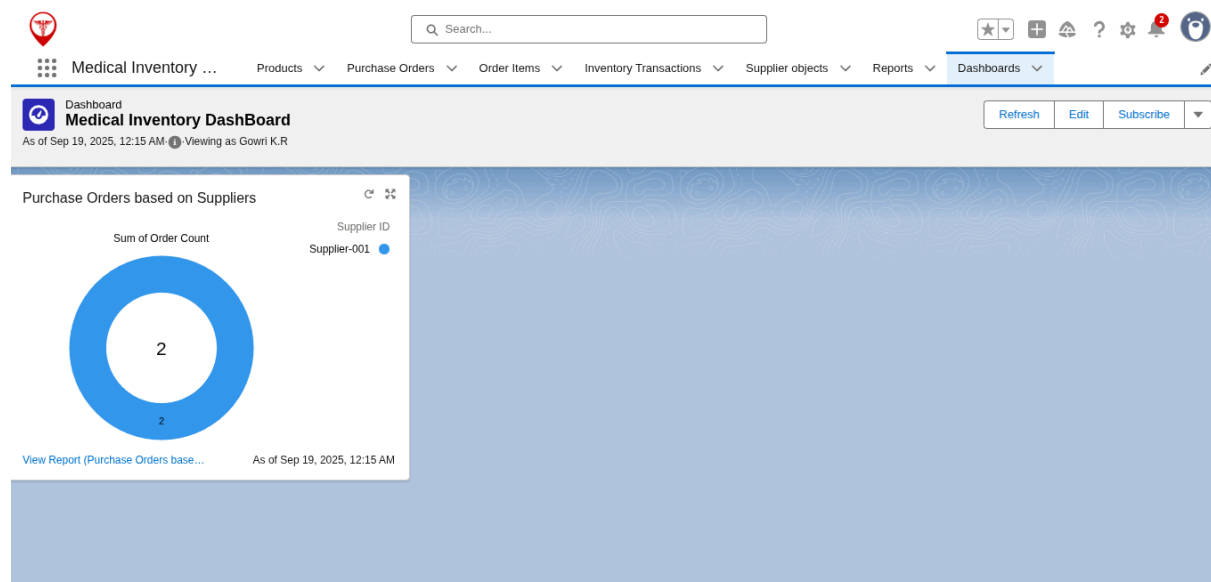
Reports:- Creating Reports named Purchase Orders Click Start report and Complete Purchase Details Report.

The screenshot shows the Salesforce Reports page for the 'Complete Purchase Details Report'. The report is for Purchase Orders and has 2 total records. The report is displayed in a table format with columns for Supplier ID, Actual Delivery Date, and Order Count. The table shows two rows of data for Supplier-001, with a subtotal of 2 for the Order Count. The report is created by Gowri K.R. on 9/18/2025 at 8:15 AM.

Supplier ID	Actual Delivery Date	Order Count
Supplier-001 (2)	9/21/2025 (1)	1
	Subtotal	1
	9/28/2025 (1)	1
	Subtotal	1
Subtotal		2
Total (2)		2



Dashboards:- We created the Dashboard for the Medical Inventory Management.



3.FUNCTIONAL AND PERFORMANCE TESTING

Performance Testing

Testing the Triggers to get the total amount in the Order Item

Medical Inventory ... Products Purchase Orders Order Items Inventory Transactions Supplier objects Reports Dashboards

Search...

Order Item
Supplier-002

New Contact Edit New Opportunity

Related Details

Order Item ID
Supplier-002

Purchase Order ID
[Purchase-0002](#)

Amount
\$0.00

Purchase Order
[Purchase-0002](#)

Product details

Product ID

Quantity Ordered

Unit Price
\$0.00

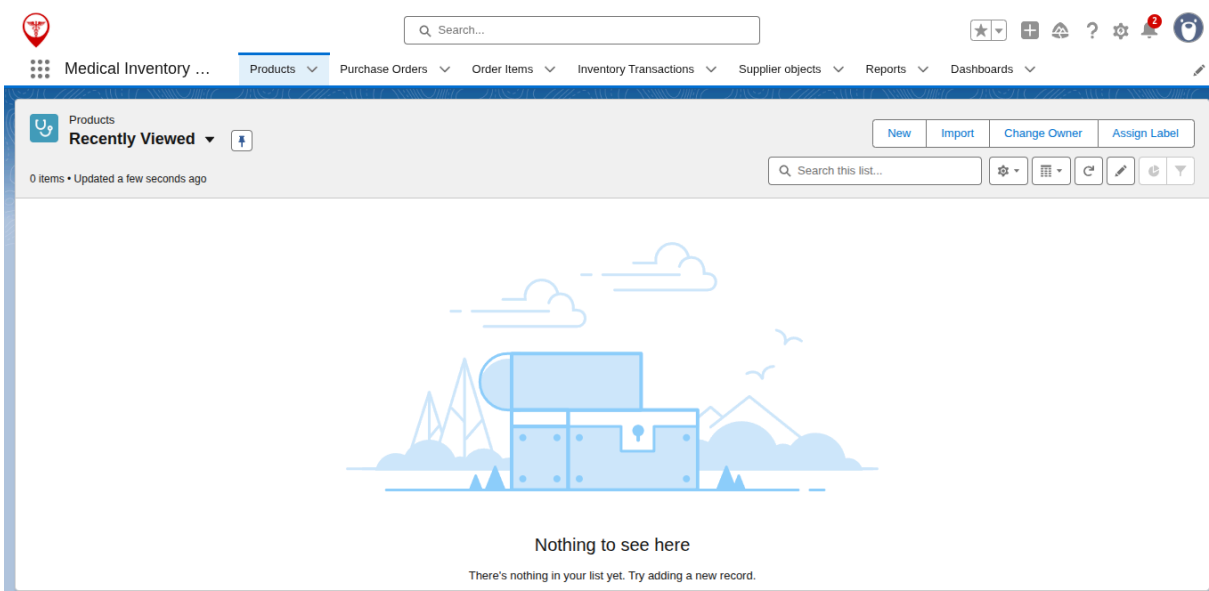
Quantity Received

Created By
Gowri K.R., 9/19/2025, 12:14 AM

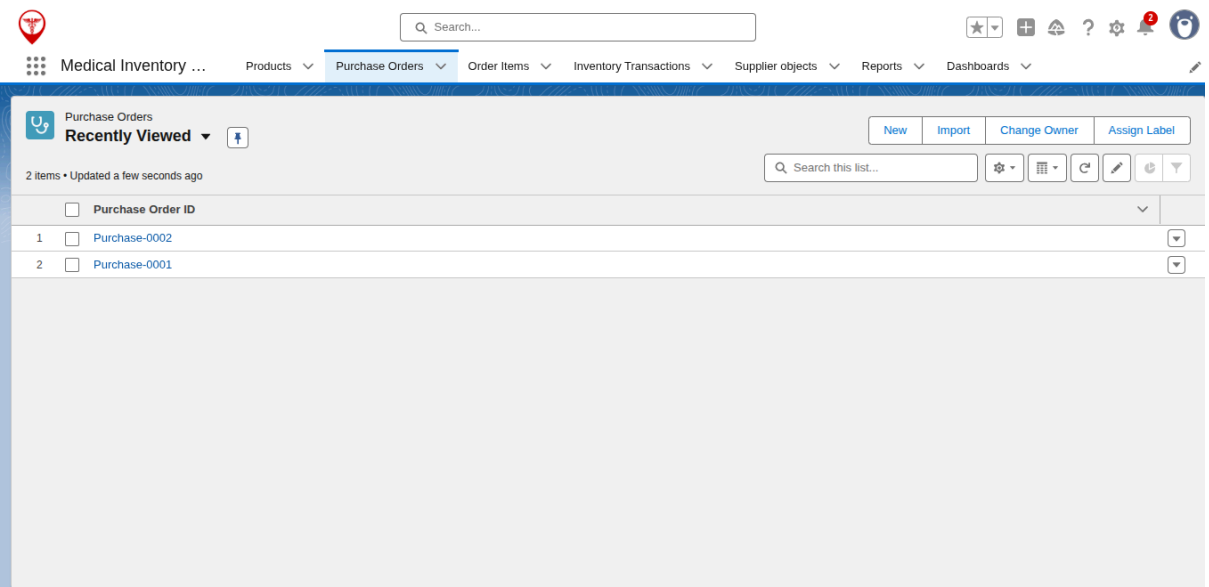
Last Modified By
Gowri K.R., 9/19/2025, 12:14 AM

RESULTS:-

Product Page



Purchase Order Page



Order Item Page

Medical Inventory ...

Search...

★

+

?

⚙

2

Products

Purchase Orders

Order Items

Inventory Transactions

Supplier objects

Reports

Dashboards

Order Items

Recently Viewed

New

Import

Assign Label

2 items • Updated a few seconds ago

Search this list...

⚙

	Order Item ID	
1	Supplier-002	
2	Supplier-001	

Reports Page

Medical Inventory ...

Search...

★

+

?

⚙

2

Products

Purchase Orders

Order Items

Inventory Transactions

Supplier objects

Reports

Dashboards

Reports

Recent

2 items

Search recent reports...


New Report

New Folder


⚙


REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	Complete Purchase Details Report		Private Reports	Gowri K.R	9/19/2025, 12:06 AM	
Created by Me	Purchase Orders based on Suppliers		Private Reports	Gowri K.R	9/18/2025, 8:27 AM	
Private Reports						
Public Reports						
All Reports						
FOLDERS						
All Folders						
Created by Me						
Shared with Me						
FAVORITES						
All Favorites						


Dashboards Page





Medical Inventory ...

















DASHBOARDS

Recent

1 item

Created by Me

Private Dashboards

All Dashboards

FOLDERS

All Folders

Created by Me

Shared with Me

FAVORITES

All Favorites

DASHBOARD NAME	DESCRIPTION	FOLDER	CREATED BY	CREATED ON	SUBSCRIBED
Medical Inventory Dashboard		Private Dashboards	Gowri K.R	9/19/2025, 12:14 AM	

ADVANTAGES AND DISADVANTAGES OF MEDICAL INVENTORY MANAGEMENT:-

Advantages:

The Salesforce-based Medical Inventory Management System provides a centralized and reliable way to manage medicines, suppliers, and transactions. It ensures real-time tracking of stock, which helps in avoiding shortages or overstocking. Features like expiry and low-stock alerts reduce wastage and make sure critical medicines are always available. Automation through validation rules, flows, and triggers minimizes manual errors, while reports and dashboards give clear insights for better decision-making. Being cloud-based, the system is accessible anytime and offers strong scalability, making it suitable for organizations of different sizes.

Disadvantages:

Despite its benefits, the system also comes with a few challenges. The initial setup and customization in Salesforce require technical knowledge, which may be difficult for beginners. Since it is cloud-based, the platform is dependent on a stable internet connection. Licensing and storage costs in Salesforce can be high for smaller clinics or pharmacies. In addition, there is a learning curve for users to fully understand and work with reports, dashboards, and automation features, and certain advanced customizations may require coding knowledge or third-party integrations.

CONCLUSION

The Salesforce-based Medical Inventory Management System successfully demonstrates how a CRM platform can be customized to address critical needs in the healthcare sector. By integrating medicines, suppliers, purchase orders, and transactions into one centralized system, it ensures accuracy, efficiency, and real-time monitoring of medical stock. Features such as automation, validation rules, and dashboards help reduce manual errors, minimize wastage, and provide valuable insights for better decision-making.

Although there are certain challenges like setup complexity, cost, and the need for user training, the long-term benefits outweigh these limitations. The system can be applied in hospitals, pharmacies, and clinics of various scales, and it can also be extended further to support larger healthcare networks. Overall, this project highlights the flexibility of Salesforce as a platform and its potential to improve efficiency and reliability in medical inventory management.