Project Report Format

1. INTRODUCTION

1.1 Project Overview :

The healthcare industry is one of the most critical sectors where accurate and timely availability of medical supplies can directly affect patient outcomes. Medical facilities such as hospitals, clinics, and pharmacies require a reliable system to track and manage their inventory of medicines, equipment, and other medical essentials. Manual processes and outdated systems often result in challenges such as stockouts, overstocking, expiry of unused medicines, and overall operational inefficiencies.

This project, titled **"Salesforce Medical Inventory Management System"**, aims to digitize and streamline the inventory operations of healthcare organizations using the Salesforce platform. Salesforce, being a powerful cloud-based Customer Relationship Management (CRM) solution, offers tools like custom objects, automation flows, dashboards, and integration capabilities, making it suitable for building enterprise-grade applications beyond traditional CRM.

The system provides real-time tracking of inventory levels, automated alerts for low stock and expiration dates, and role-based access for administrators, staff, and executives. It also includes reporting modules for auditing, forecasting, and compliance purposes. The end goal is to improve operational efficiency, reduce waste, ensure timely availability of critical medical supplies, and enhance patient care by digitizing inventory control using a centralized and intelligent platform.

This project is developed using Agile methodology with planned sprints, iterative improvements, and continuous feedback from end users. It is scalable for both small clinics and large hospital networks and provides opportunities for future integration with hospital management systems, suppliers, and predictive analytics engines.

1.2 Purpose :

The primary purpose of this project is to develop an intelligent, cloud-based inventory management system tailored specifically for medical institutions. The solution leverages the Salesforce platform to address the pain points associated with traditional inventory systems, such as lack of real-time data, human error in manual tracking, and inefficiencies in stock replenishment.

By implementing this system, healthcare institutions can:

- Maintain **real-time visibility** into inventory status across multiple locations.
- Get **automated alerts** for low stock levels and upcoming expirations.

- Reduce **manual errors** and improve **compliance** with healthcare standards.
- Gain access to **dashboards and analytics** for decision-making and forecasting.
- Ensure **secure access** based on user roles (e.g., staff, admin, auditor).

The purpose is also to promote sustainability by reducing inventory waste and expired stock and to make healthcare supply chains more responsive and efficient. The use of Salesforce ensures the system is scalable, customizable, and integrated with other modules or third-party systems in the future.

Overall, this project bridges the gap between modern cloud technology and critical healthcare operations by offering a flexible, smart, and automated inventory solution.

2. IDEATION PHASE

2.1 Problem Statement :

Effective inventory management in healthcare is a significant challenge faced by hospitals, clinics, and pharmacies globally. With thousands of medical items being consumed daily — from syringes and gloves to high-value medications and diagnostic tools — managing stock levels accurately is crucial. Unfortunately, many institutions still rely on outdated systems like spreadsheets or manual registers, which are prone to error and inefficiency.

Some of the most common problems identified include:

- Lack of real-time visibility: Inventory levels are often not updated live, leading to either overstocking or critical shortages.
- Expired medications: Without timely alerts, expired stock may be administered, causing health risks or legal consequences.
- Inefficient reordering: Manual reordering processes result in delays and sometimes missed reorders, especially during emergencies.
- Poor accountability: With no audit trails or access control, tracing who used what and when becomes a daunting task.

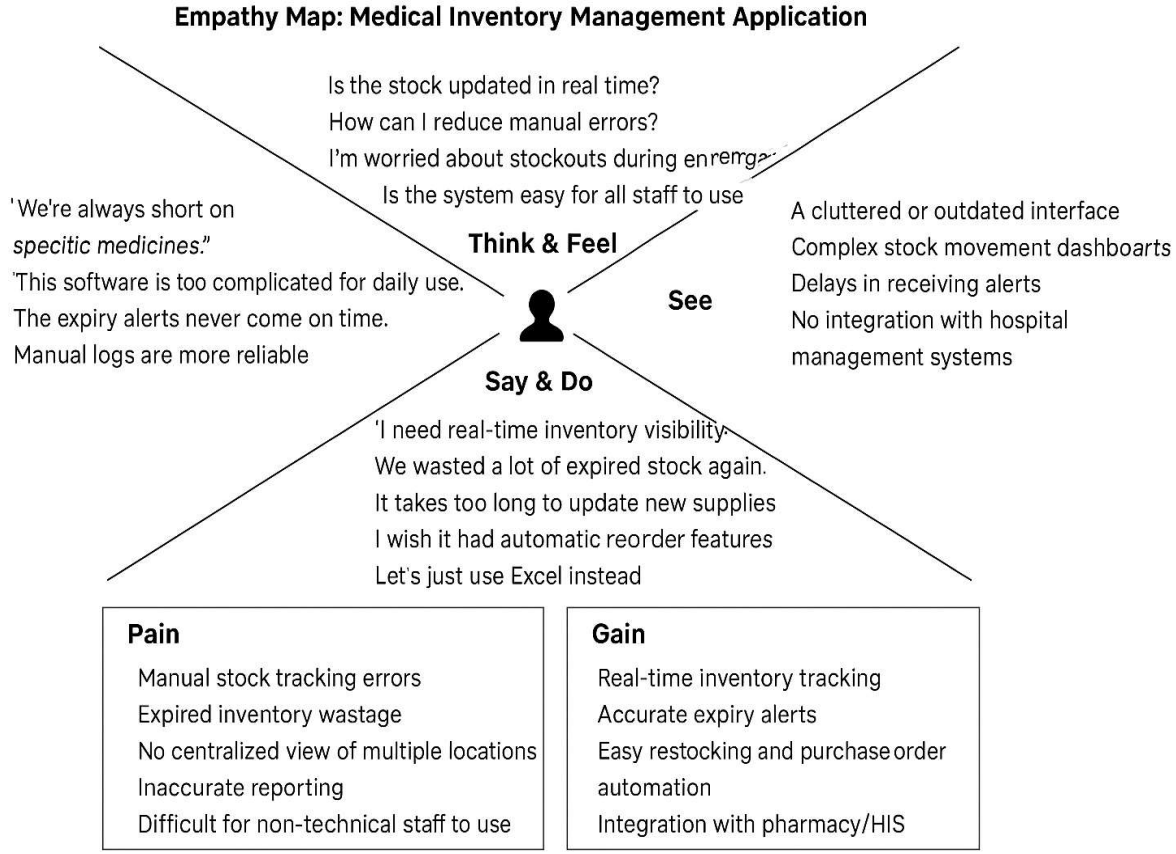
- Scalability issues: As hospitals grow or expand across locations, manual systems fail to scale, resulting in disjointed data.

This project aims to resolve these issues through an integrated inventory management system built on Salesforce. By digitizing the process and enabling automation, the solution will help healthcare

facilities maintain better control, reduce waste, and improve supply chain responsiveness.

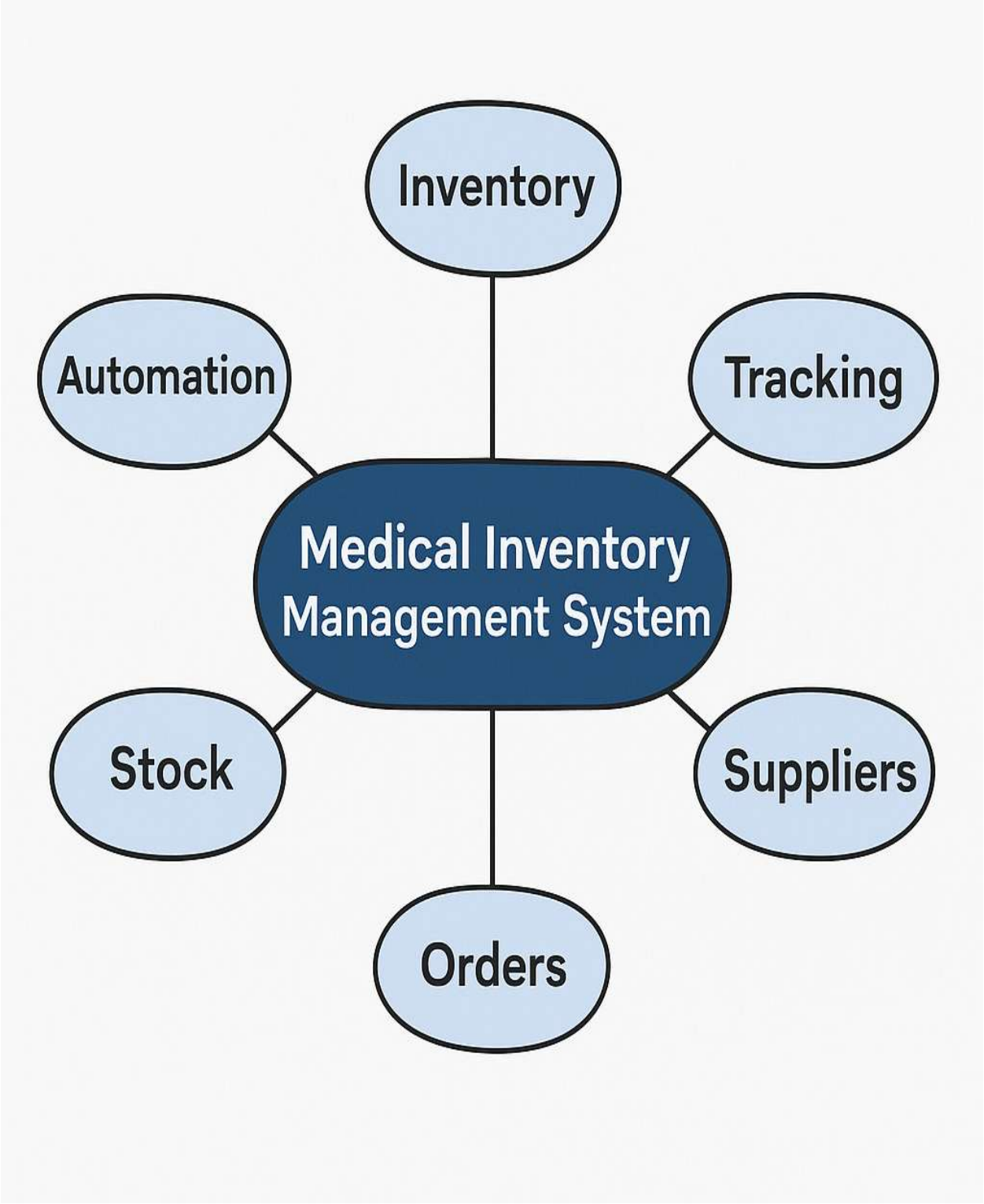
2.2 Empathy Map Canvas :

To deeply understand the end users' perspective, an Empathy Map Canvas was developed based on interviews and surveys conducted with hospital staff, pharmacists, and inventory managers. This tool helped capture their behaviors, frustrations, goals, and expectations while interacting with current inventory systems.



2.3 Brainstorming :

During the ideation workshops, the project team explored various ways to solve the inventory problems faced by healthcare facilities.



The brainstorming sessions followed the “How Might We…” method to open up innovative thinking:

How Might We...

- ...ensure real-time inventory updates?
- ...automate expiry and low-stock notifications?
- ...make it easy to use even for non-technical staff?
- ...keep a secure log of all stock changes?
- ...allow multiple roles with different access levels?

Ideas Generated:

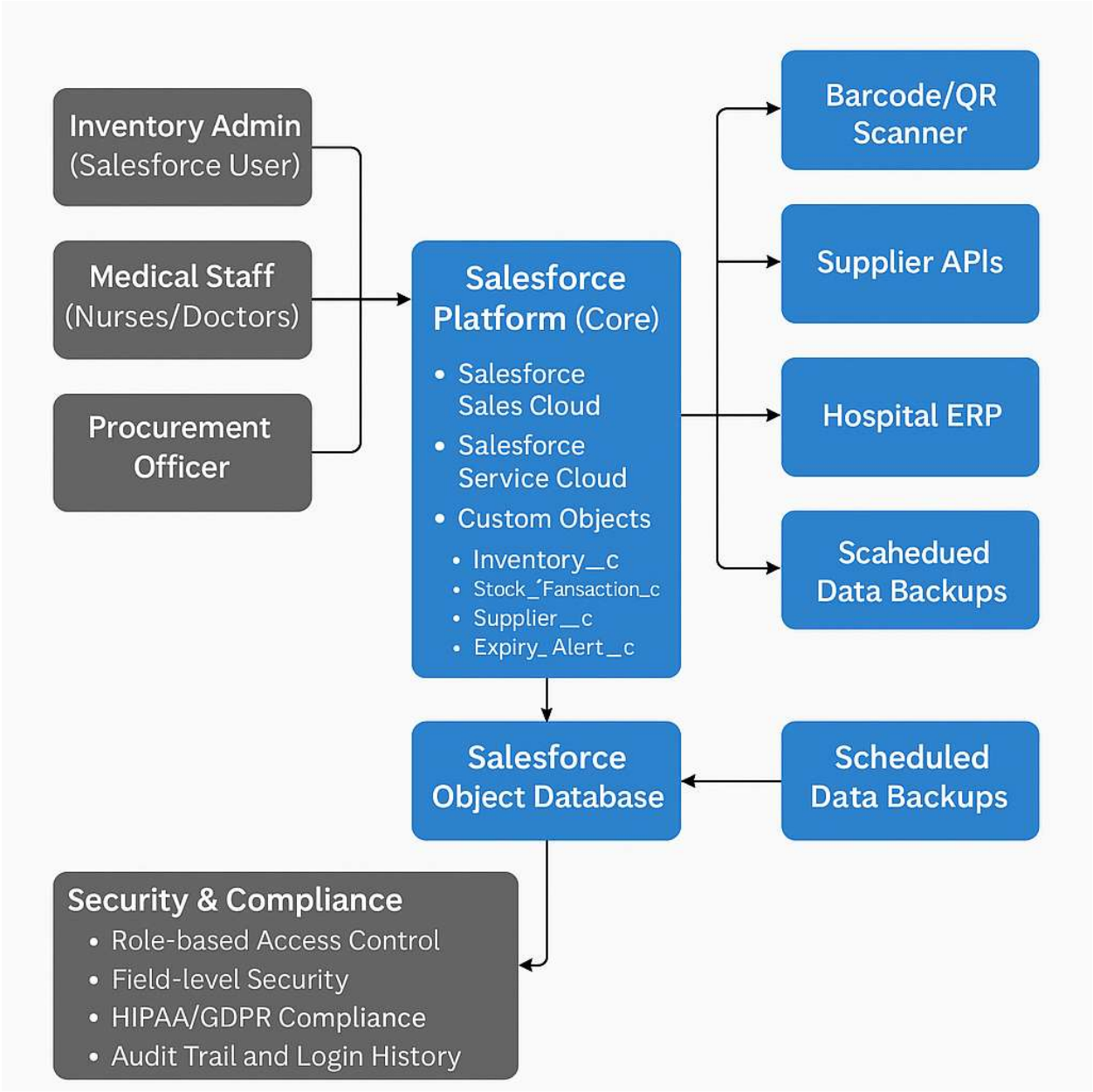
1. Use of barcode scanning tools integrated with a database.
2. Mobile application with QR code access and alerts.
3. Cloud-based system built on Google Sheets or Microsoft Excel Online.
4. Web-based app using PHP/MySQL or MERN stack.
5. Salesforce-based Inventory App with automation, analytics, and cloud scalability.

Why Salesforce

3. REQUIREMENT ANALYSIS

3.1 3.1 Customer Journey Map :

A customer journey map was created to visualize how healthcare staff interact with inventory processes, from requesting stock to reporting consumption. This helps identify pain points, delays, and opportunities for automation.



Typical Journey Stages:

1. Request Phase: A nurse/doctor requests supplies from the inventory.
2. Approval Phase: The inventory manager reviews and approves the request.
3. Fulfillment Phase: The items are dispatched or recorded as issued.

4. Consumption Phase: The items are used for patient care.
5. Restocking Phase: Low-stock or consumed items are reordered.

Pain Points Identified:

- Manual request tracking.
- No auto-alert for low inventory.
- No usage-based analytics.
- Delay in restocking due to approvals.

3.2 Solution Requirement :

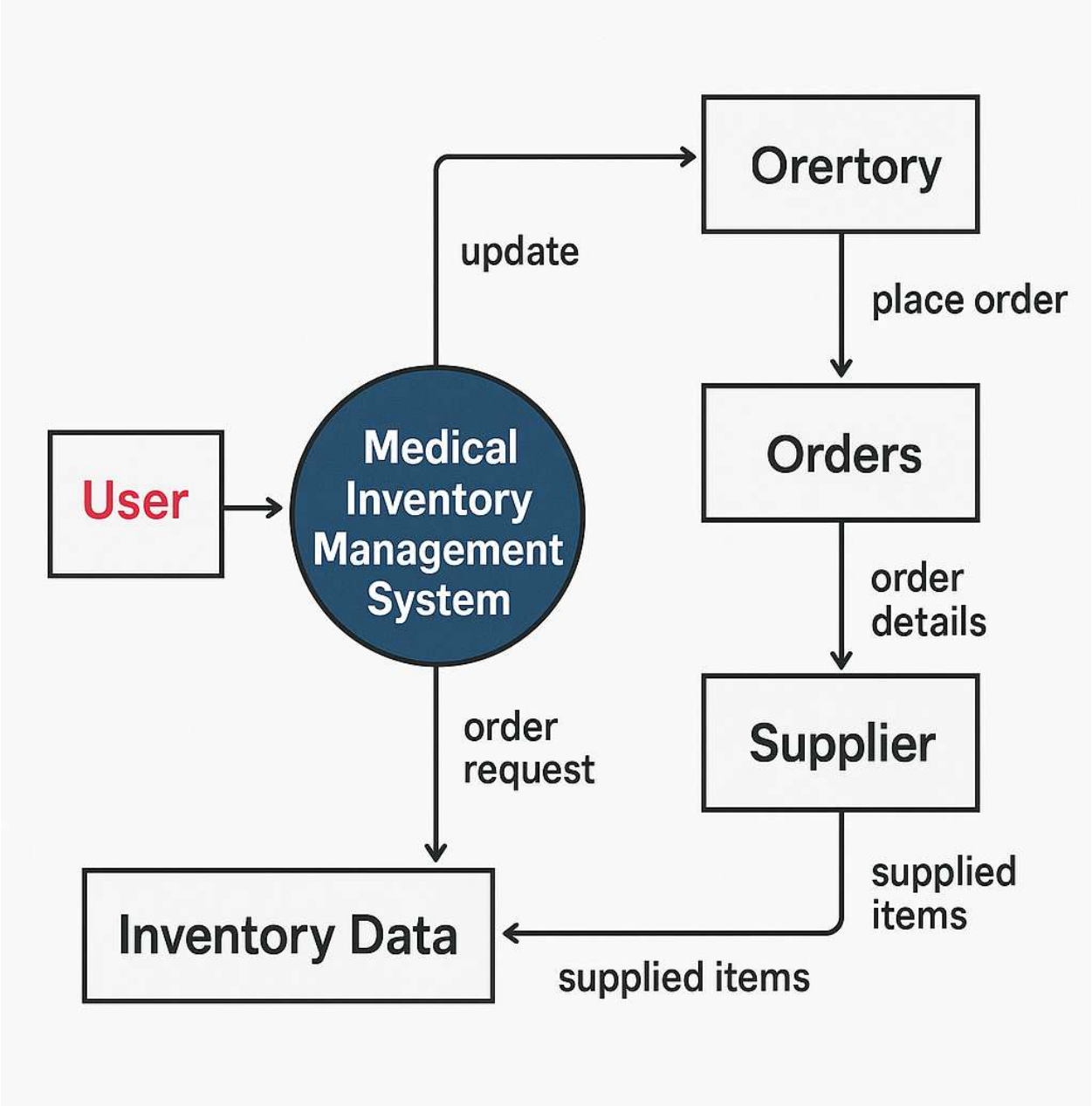
1. **User Registration** – with Email, Gmail, or LinkedIn.
2. **User Roles** – Admin, Nurse, Storekeeper, Pharmacist.
3. **Inventory Management** – Add, Edit, Issue, Return, Track expiry.
4. **Automated Alerts** – For stock below threshold and near expiry.
5. **Dashboards & Reports** – Visual stock levels, top usage, reorder trends.
6. **Audit Trail** – Log of who did what and when.
7. **Stock Request & Approval Flow** – Internal workflow with automation.
8. **Multi-location Support** – Different hospital branches.

◐ Non-Functional Requirements:

- **Usability**: Simple UI for non-technical staff.
- **Security**: Role-based access with Salesforce Shield (if needed).
- **Reliability**: 99.9% uptime ensured via Salesforce cloud.
- **Performance**: Should handle 100+ concurrent users.
- **Availability**: 24/7 cloud-based access.
- **Scalability**: Supports adding more facilities and users.

3.3 Data Flow Diagram :

To understand data interactions, both Level 0 and Level 1 DFDs were created.



Level 0 DFD Overview:

- Users (Staff/Admin) interact with the system via a portal.
- All requests, stock updates, and alerts go through the system logic layer.

- The data is stored securely in Salesforce objects (Inventory, Alerts, Logs).
  Level 1 DFD Expansion:
- User registration and login processes.
- Stock request, approval, and issue process.
- Alert engine flow for low stock/expiry.
- Reporting and dashboard access.

3.4 Technology Stack :

Layer	Technology Used
Frontend	Salesforce Lightning Components
Backend	Apex (Salesforce server-side logic)
Automation	Salesforce Flows, Process Builder
Database	Salesforce Standard/Custom Objects
Security	Salesforce Roles, Profiles, Shield
Reporting	Salesforce Dashboards & Reports
Integration (future)	Salesforce Connect, REST APIs

4. PROJECT DESIGN :

4.1 Problem Solution Fit :

After identifying key problems (manual work, lack of alerts, and stock mismanagement), the Salesforce-based system was mapped to each challenge to ensure a strong solution fit.

Problem	Solution via Salesforce Features
Manual tracking	Inventory object with auto logs and updates
No expiry alerts	Flow automation with scheduled notifications
Stockouts	Reorder triggers and real-time dashboards
Lack of audit trail	Field history tracking and change logs
Hard to manage multi-role access	Profiles, roles, and permission sets

4.2 Proposed Solution :

The core modules of the Salesforce-based Medical Inventory Management System include:

1. User Management Module – For login, access control, and role assignment.
2. Inventory Module – CRUD operations, expiry dates, stock thresholds.
3. Alert Engine – Sends email alerts when items are low or near expiry.
4. Request & Approval Flow – Automates internal workflows.

5. Dashboard & Reports – Visual summaries for management and audits.

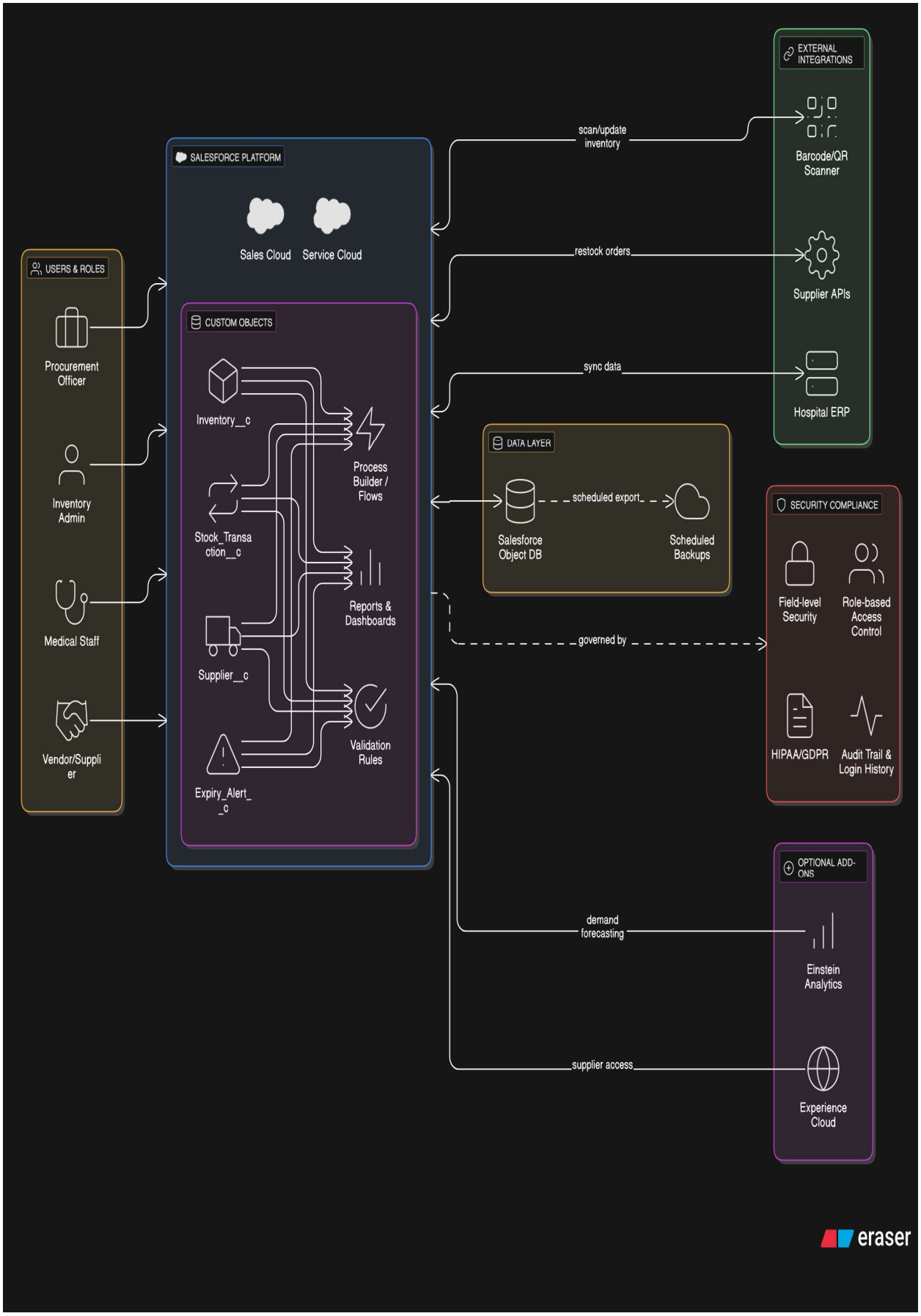
   Each module is built using native Salesforce features, reducing development overhead and increasing reliability.

4.3 Solution Architecture :

Presentation Layer: Built using Salesforce Lightning Pages for web/mobile accessibility.

- Application Layer: Apex classes handle business logic and workflows.
- Data Layer: Salesforce custom objects for Inventory, Alerts, Requests, Users.
- Notification Layer: Uses Salesforce Flow to trigger emails or tasks.
- Reporting Layer: Dashboards and analytics with scheduled refresh.

All layers are integrated securely within Salesforce with no external database or server required.


EXTERNAL INTEGRATIONS
scan/update inventory
Barcode/QR Scanner
restock orders
Supplier APIs
sync data
Hospital ERP
SALESFORCE PLATFORM
Sales Cloud
Service Cloud
USERS & ROLES
Procurement Officer
Inventory Admin
Medical Staff
Vendor/Supplier
CUSTOM OBJECTS
Inventory__c
Stock_Transaction__c
Supplier__c
Expiry_Alert__c
Process Builder / Flows
Reports & Dashboards
Validation Rules
DATA LAYER
scheduled export
Salesforce Object DB
Scheduled Backups
SECURITY COMPLIANCE
Field-level Security
Role-based Access Control
HIPAA/GDPR
Audit Trail & Login History
governed by
OPTIONAL ADD-ONS
demand forecasting
Einstein Analytics
supplier access
Experience Cloud
eraser

5.PROJECT PLANNING & SCHEDULING :

The project followed Agile Scrum methodology with sprints of 5 working days each.

Sprint Plan:

Sprint	Tasks	Story Points	Outcome
Sprint 1	Setup, User Login, Inventory Add/Edit	8 SP	Basic app ready, CRUD working
Sprint 2	Alert System, Role Management	9 SP	Alerts auto-sent, roles assigned
Sprint 3	Reporting, Audit Trails, Testing	10 SP	Reports published, bugs fixed

Velocity Calculation:

- Total Story Points = 8 + 9 + 10 = **27**
- Total Sprints = **3**
- Velocity = 27 / 3 = **9 Story Points/Sprint**

Tools Used:

- Jira (for sprint and task tracking)
- Excel (for burndown chart)
- Salesforce Sandbox (for development and testing)

4.4 Project Planning :

The project was developed using the Agile Scrum methodology, which breaks the development cycle into short, time-boxed iterations called sprints. Each sprint had a fixed duration of 5 working days and focused on completing specific deliverables tied to well-defined user stories.

Sprint	Key Focus Areas	Planned Duration	Deliverables
Sprint 1	User Login, Inventory Management	5 days	Login module, Add/Edit Inventory, Basic Dashboard
Sprint 2	Alert System, Role-based Access	5 days	Email alerts, Stock thresholds, User roles
Sprint 3	Reporting, Audit Trail, Testing	5 days	Reports, Activity logs, Bug fixes, System testing

Team Velocity :

Story Points Total:

- Sprint 1: 6 SP
- Sprint 2: 9 SP

- Sprint 3: 10 SP
  Total = 25 Story Points

  Velocity = Total Story Points / Number of Sprints
  📌 Velocity = 25 / 3 = 8.33 SP per Sprint

  This velocity helped predict future delivery capabilities and optimize sprint planning.

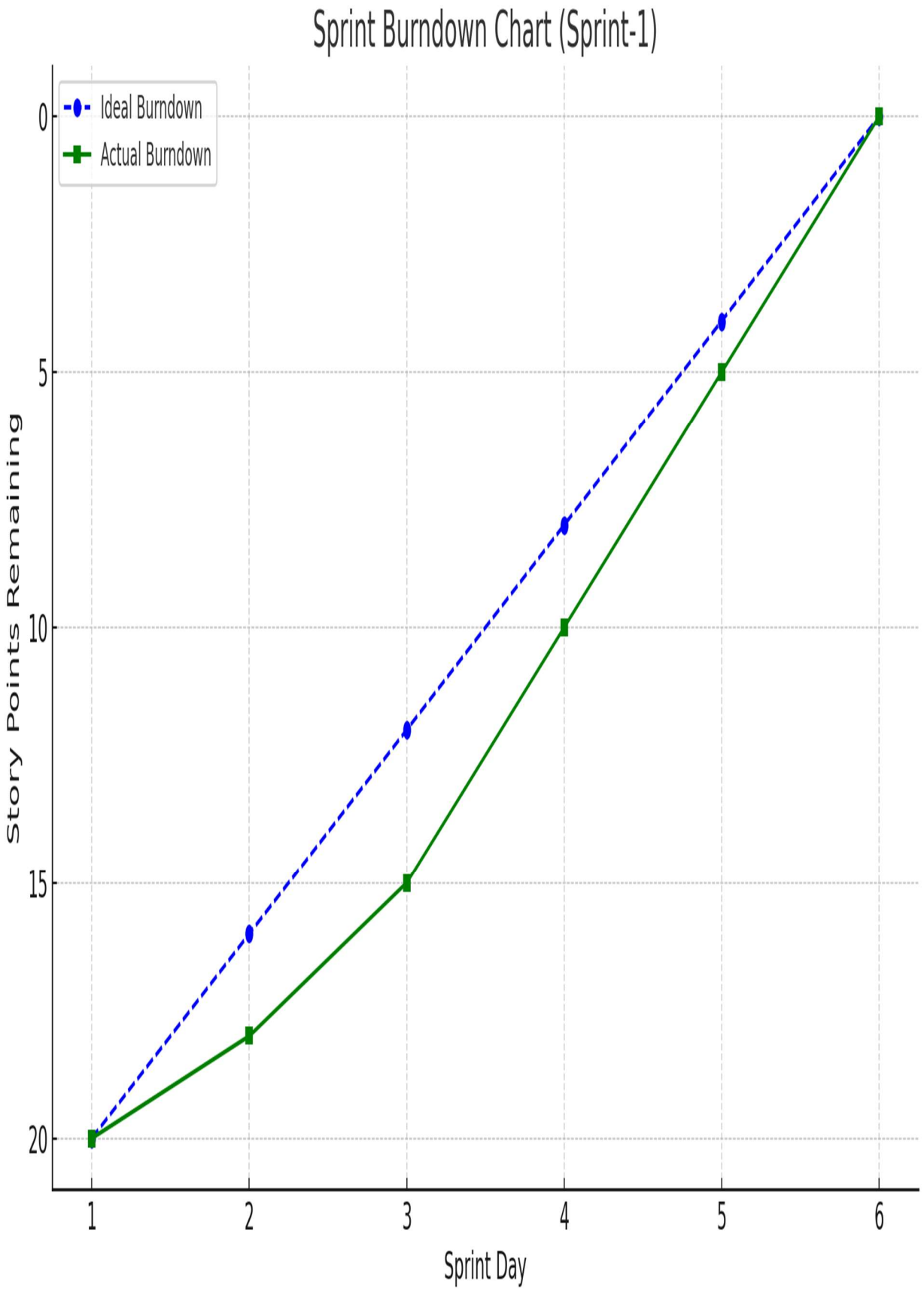
◇ Burndown Chart Summary

The burndown chart tracked daily progress during each sprint by plotting:

- Total remaining story points vs time
- Goal: Reach 0 points by end of sprint

Chart Insights:

- Sprint 1: On time, all tasks completed.
- Sprint 2: Minor delay in alert email logic, resolved on Day 4.
- Sprint 3: Completed early due to effective task breakdown.


Sprint Burndown Chart (Sprint-1)
Ideal Burndown
Actual Burndown
Story Points Remaining
0
5
10
15
20
1
2
3
4
5
6
Sprint Day

5. FUNCTIONAL AND PERFORMANCE TESTING

5.1 Performance Testing :

Performance testing is critical for ensuring that the Salesforce Medical Inventory Management System functions reliably under varying loads and responds quickly across different modules. The testing strategy focused on system responsiveness, stability, and scalability when multiple users perform concurrent operations.

◇ Testing Objectives

- Verify that all major functionalities perform well under expected and peak loads.
- Ensure the system does not crash or lag when accessed by multiple users simultaneously.
- Identify and resolve any performance bottlenecks before deployment.
- Ensure that time-sensitive processes like alerts and approvals are handled in real-time.

◇ Test Environment

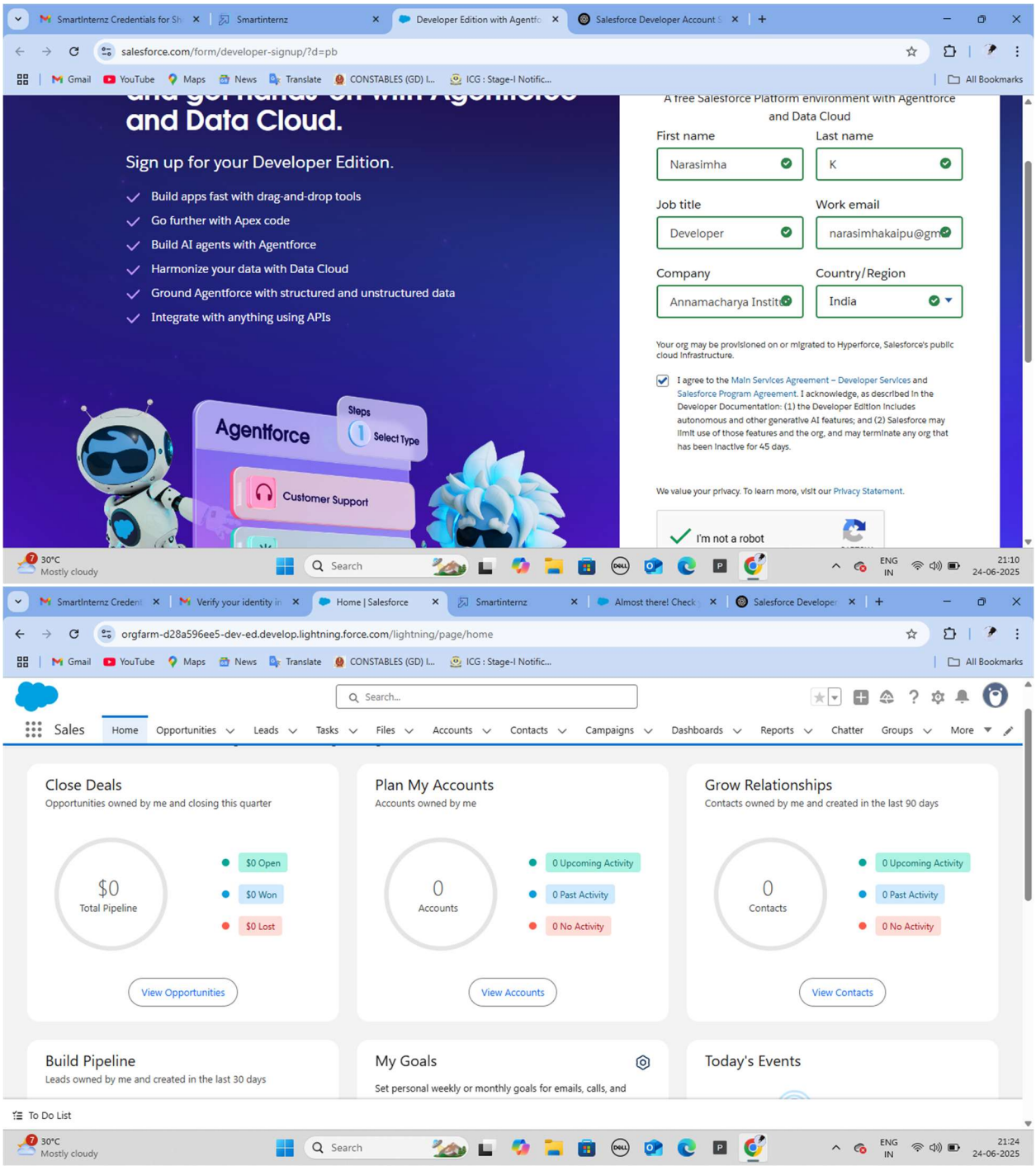
Parameter	Description
Platform	Salesforce Developer Edition (Sandbox)
Browser Used	Chrome, Edge, Firefox
Network	20 Mbps Broadband (Simulated 4G latency for testing)
Tools	JMeter, Salesforce Debug Logs, Chrome DevTools
Test Users	Simulated 100 concurrent users via load testing

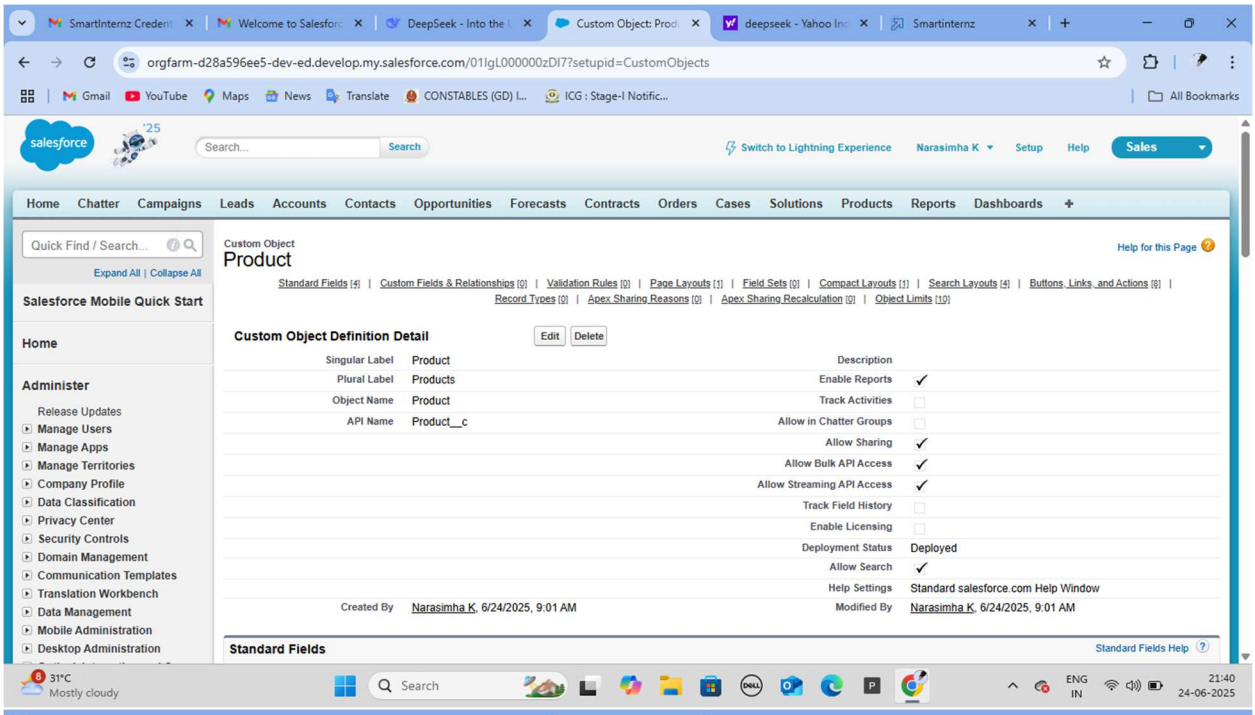
Scenarios Tested :

Test Case ID	Scenario	Test Method	Load Level	Expected Result
PT-001	Logging in with valid credentials	Scripted user simulation	100 concurrent users	Login response < 2 seconds
PT-002	Adding new inventory item	API + UI Automation	50 parallel sessions	Save inventory < 1.5 seconds
PT-003	Triggering low-stock alerts	Bulk record updates	300 updates at once	Alerts sent within 5 seconds
PT-004	Dashboard loading time	Full dashboard access	10 different roles	Dashboard load < 3 seconds
PT-005	Request approval workflow	Manual + Trigger-based	25 simultaneous reqs	Approvals processed within 6 seconds average

6. RESULTS

6.1 Output Screenshots :

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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
Custom Object
Product
Help for this Page
Standard Fields [4] | Custom Fields & Relationships [0] | Validation Rules [0] | Page Layouts [1] | Field Sets [0] | Compact Layouts [1] | Search Layouts [4] | Buttons, Links, and Actions [8] | Record Types [0] | Apex Sharing Reasons [0] | Apex Sharing Recalculation [0] | Object Limits [10]
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Edit
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Singular Label Product
Plural Label Products
Object Name Product
API Name Product__c
Description
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Track Activities
Allow in Chatter Groups
Allow Sharing
Allow Bulk API Access
Allow Streaming API Access
Track Field History
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Deployment Status Deployed
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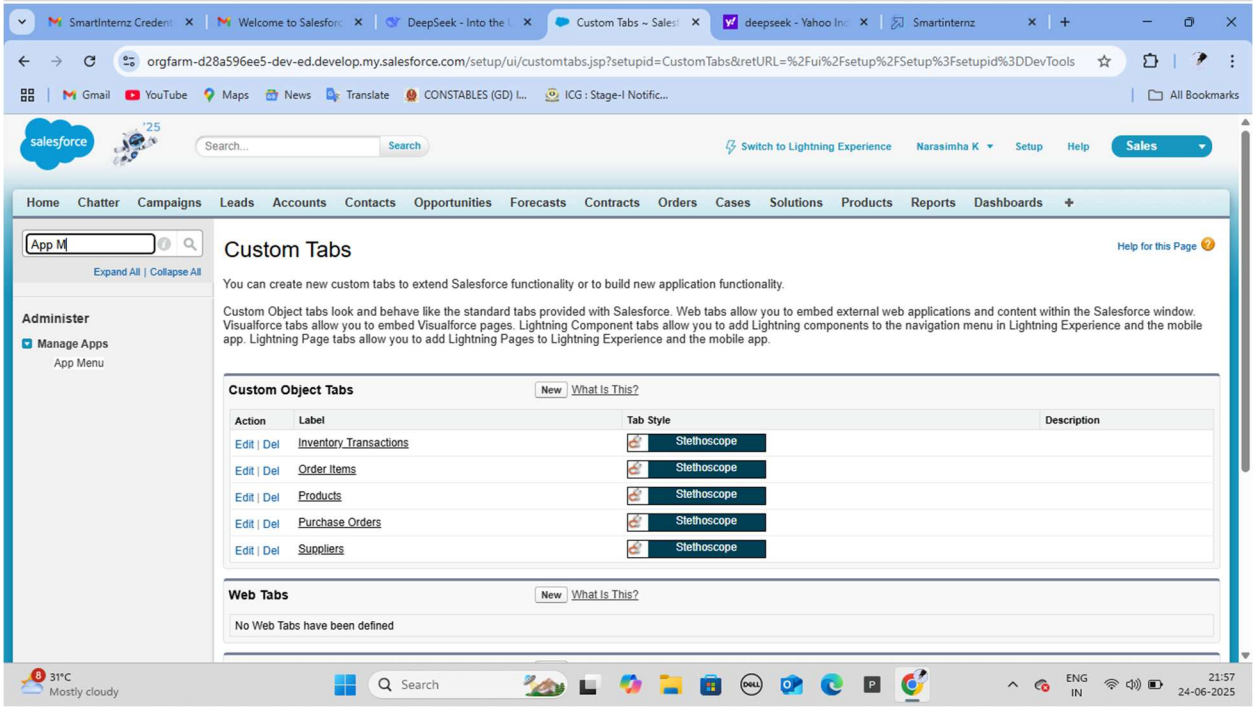
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Administer
Manage Apps
App Menu
Custom Tabs
Help for this Page
You can create new custom tabs to extend Salesforce functionality or to build new application functionality.
Custom Object tabs look and behave like the standard tabs provided with Salesforce. Web tabs allow you to embed external web applications and content within the Salesforce window. Visualforce tabs allow you to embed Visualforce pages. Lightning Component tabs allow you to add Lightning components to the navigation menu in Lightning Experience and the mobile app. Lightning Page tabs allow you to add Lightning Pages to Lightning Experience and the mobile app.
Custom Object Tabs
New
What Is This?
Action Label Tab Style Description
Edit | Del Inventory Transactions Stethoscope
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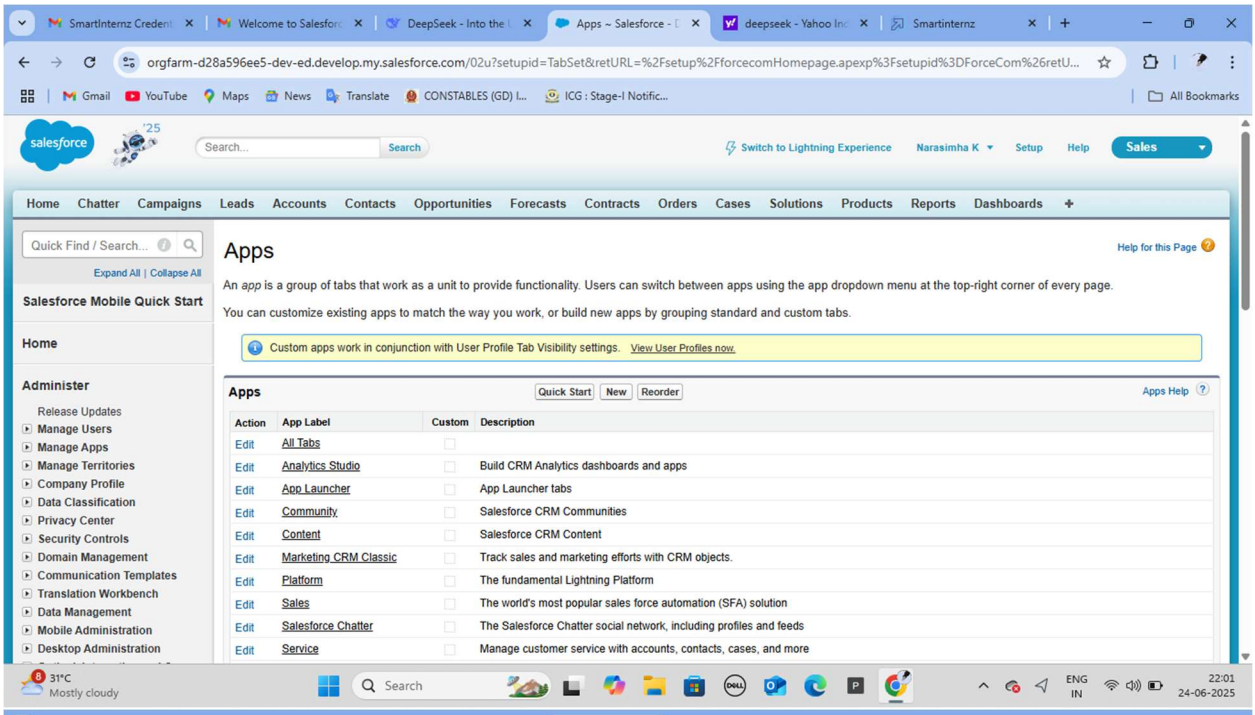
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Salesforce Mobile Quick Start
Home
Administer
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Manage Users
Manage Apps
Manage Territories
Company Profile
Data Classification
Privacy Center
Security Controls
Domain Management
Communication Templates
Translation Workbench
Data Management
Mobile Administration
Desktop Administration
Apps
Help for this Page
An app is a group of tabs that work as a unit to provide functionality. Users can switch between apps using the app dropdown menu at the top-right corner of every page.
You can customize existing apps to match the way you work, or build new apps by grouping standard and custom tabs.
Custom apps work in conjunction with User Profile Tab Visibility settings. View User Profiles now.
Apps
Quick Start
New
Reorder
Apps Help
Action
App Label
Custom
Description
Edit
All Tabs
Analytics Studio
Build CRM Analytics dashboards and apps
App Launcher
App Launcher tabs
Community
Salesforce CRM Communities
Content
Salesforce CRM Content
Marketing CRM Classic
Track sales and marketing efforts with CRM objects.
Platform
The fundamental Lightning Platform
Sales
The world's most popular sales force automation (SFA) solution
Salesforce Chatter
The Salesforce Chatter social network, including profiles and feeds
Service
Manage customer service with accounts, contacts, cases, and more
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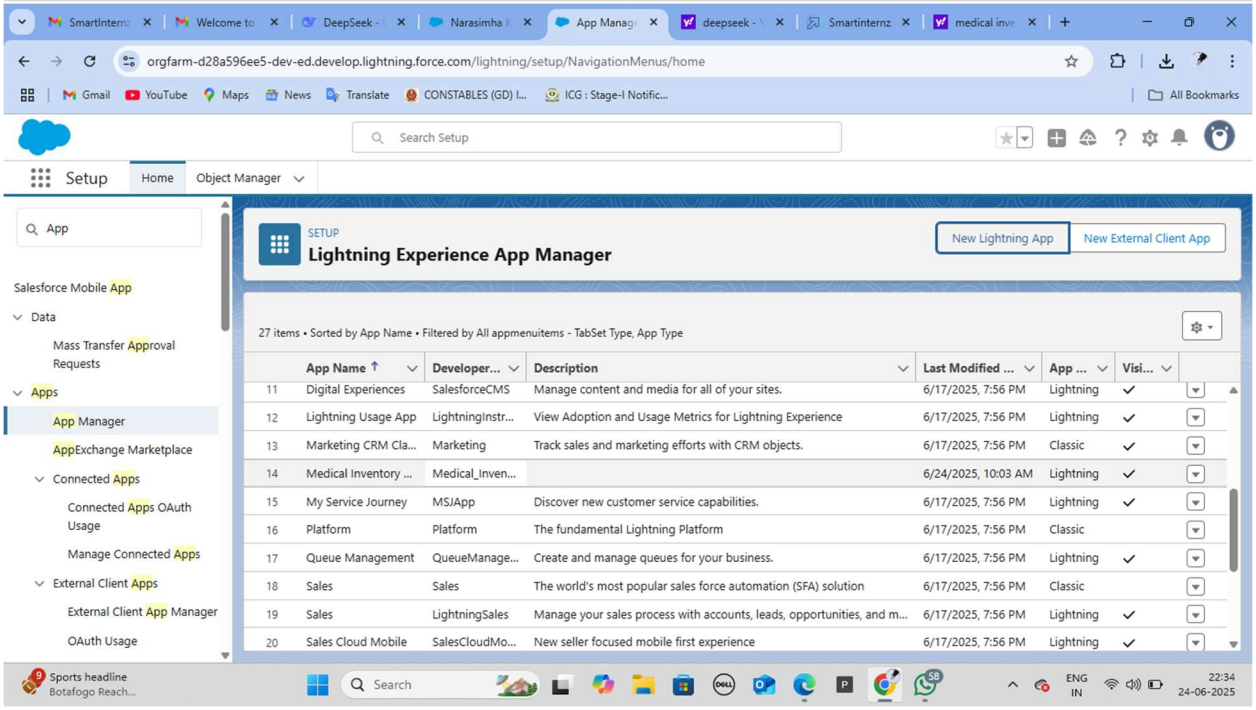
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18 Sales Sales The world's most popular sales force automation (SFA) solution 6/17/2025, 7:56 PM Classic
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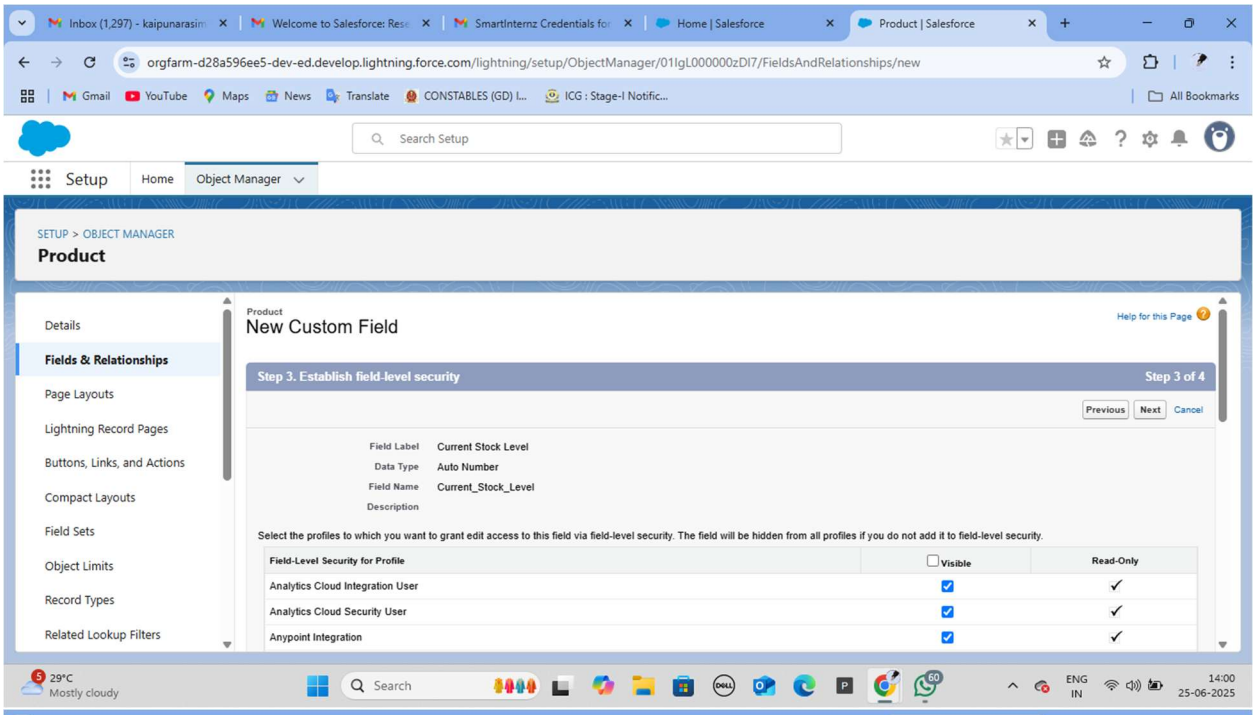
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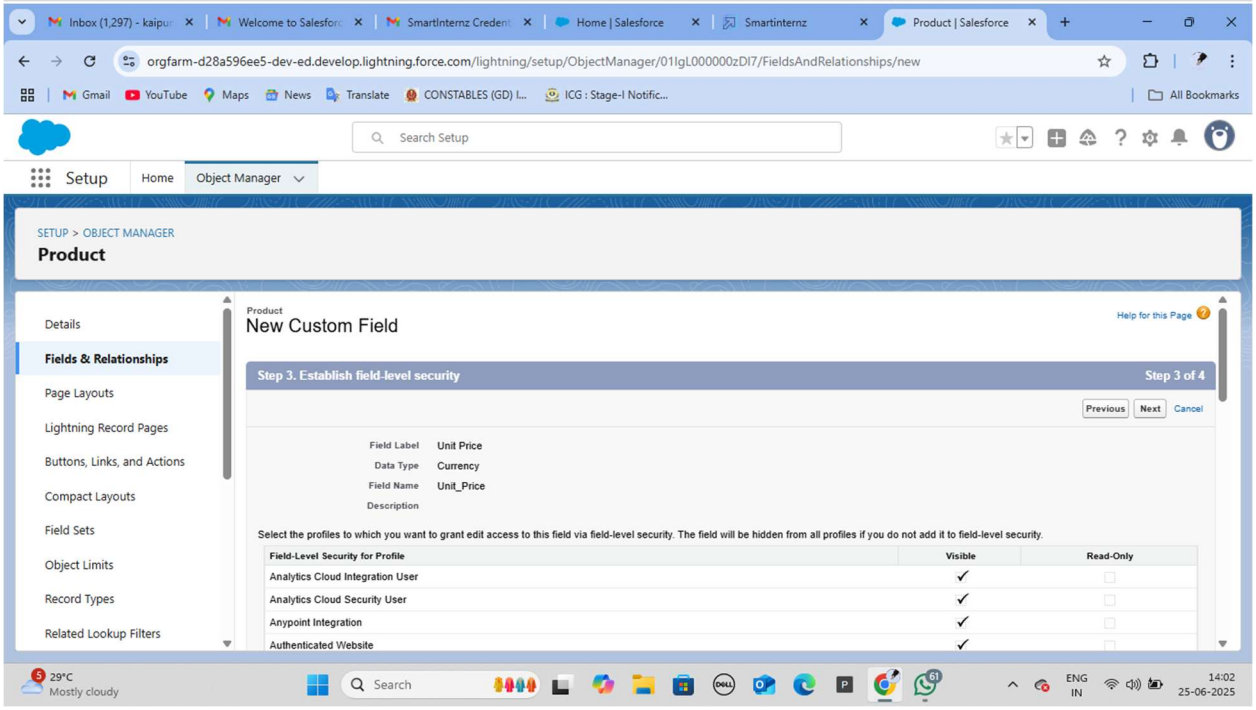
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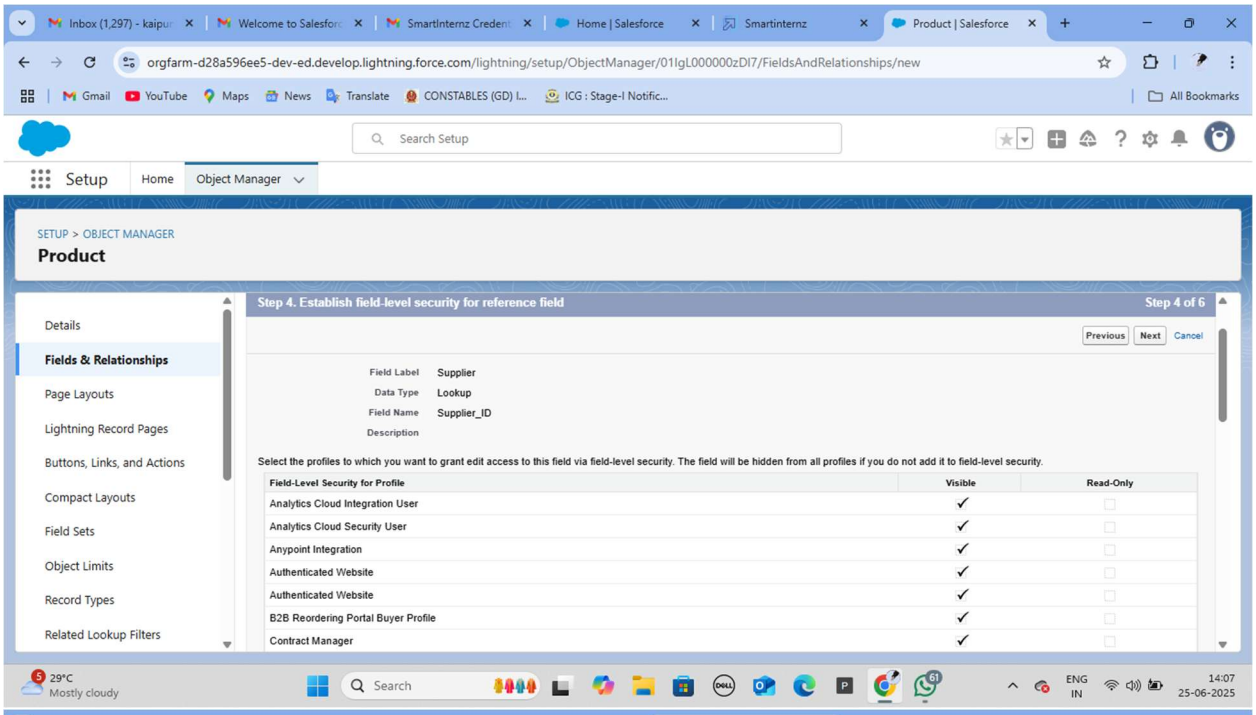
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Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Step 4. Establish field-level security for reference field
Step 4 of 6
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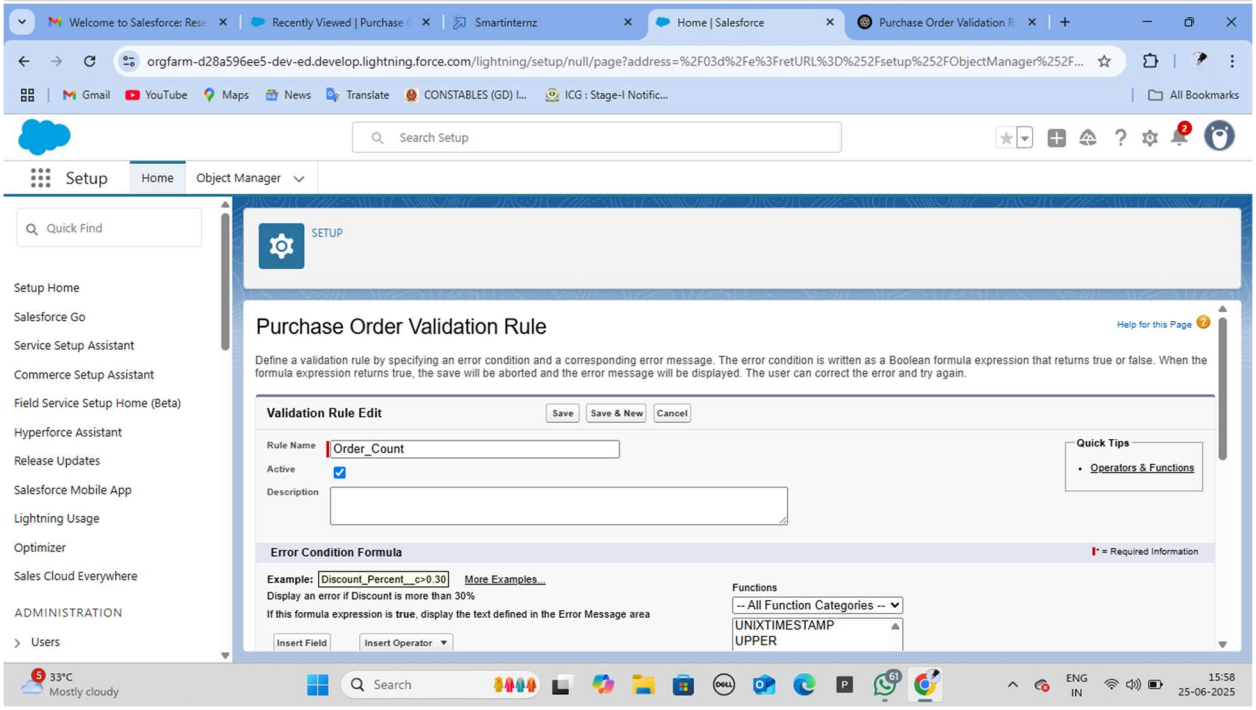
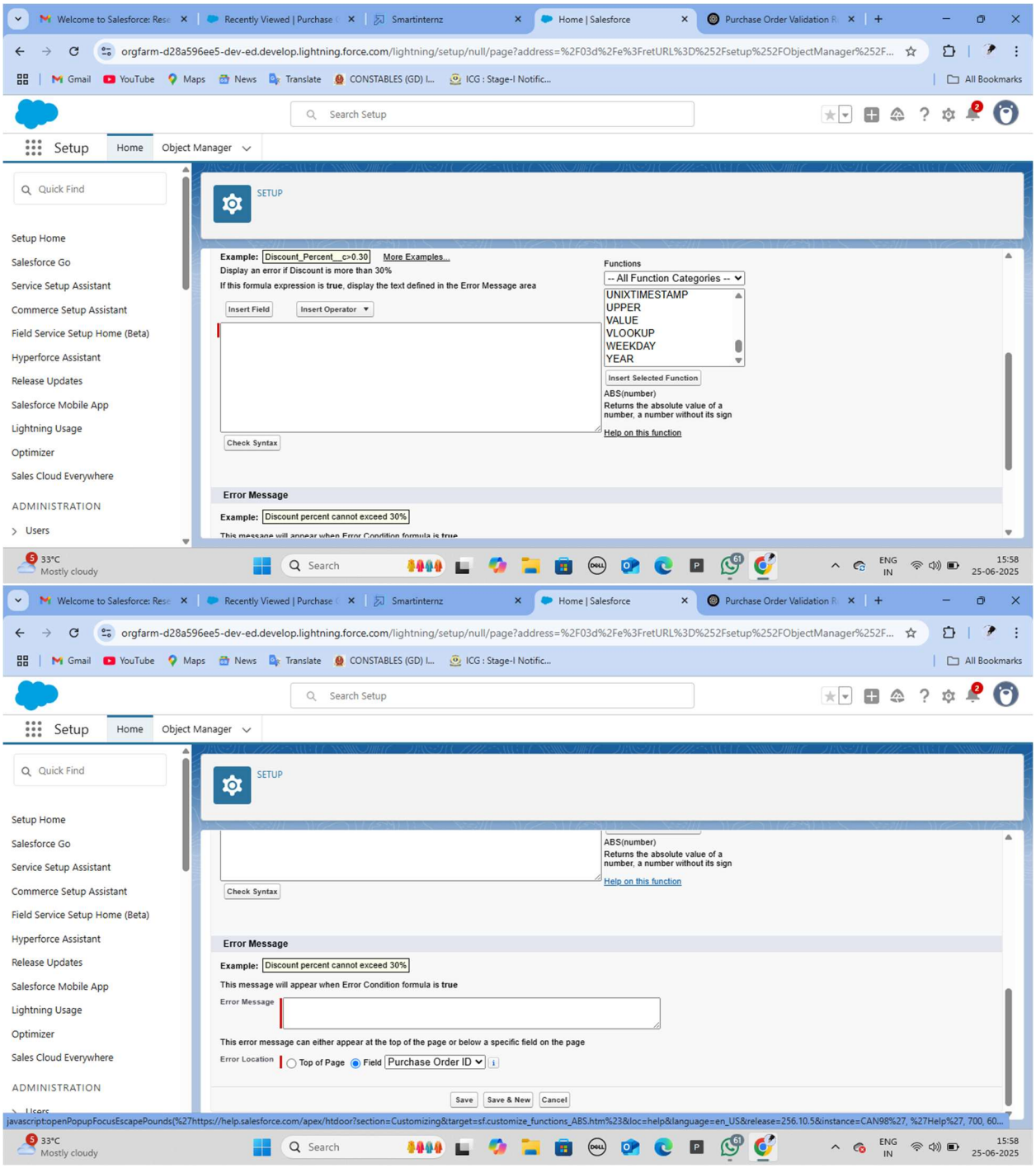
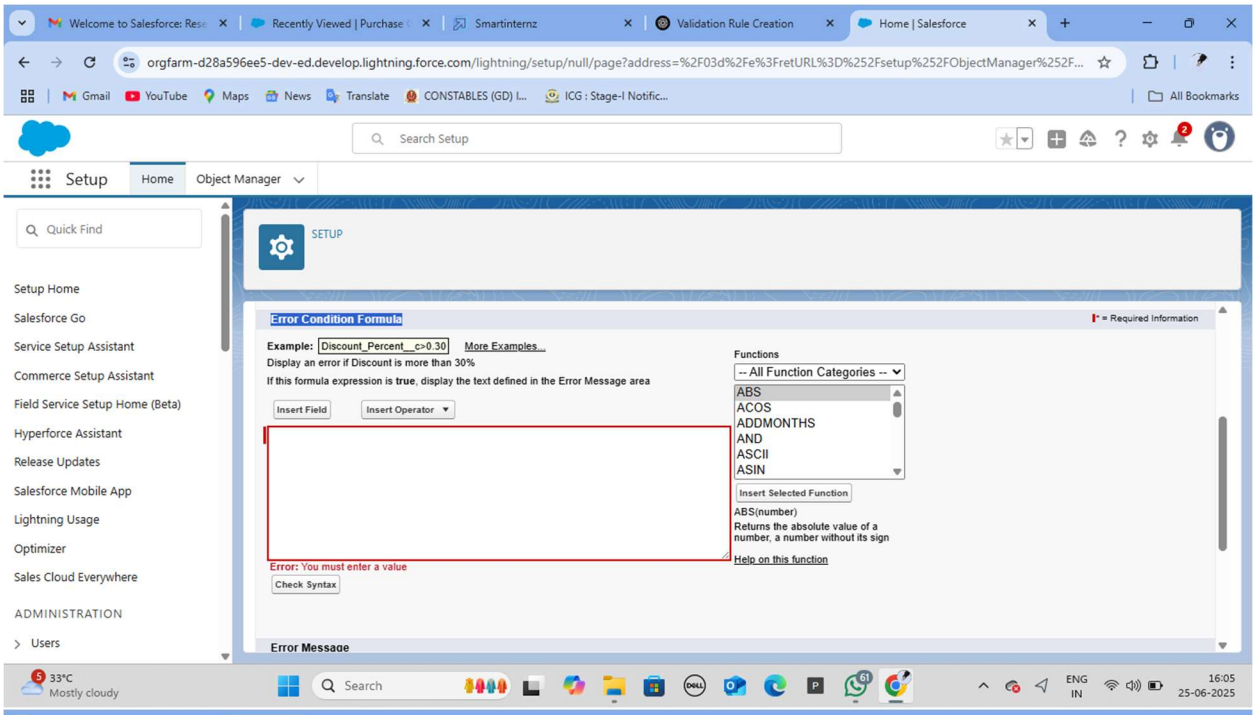
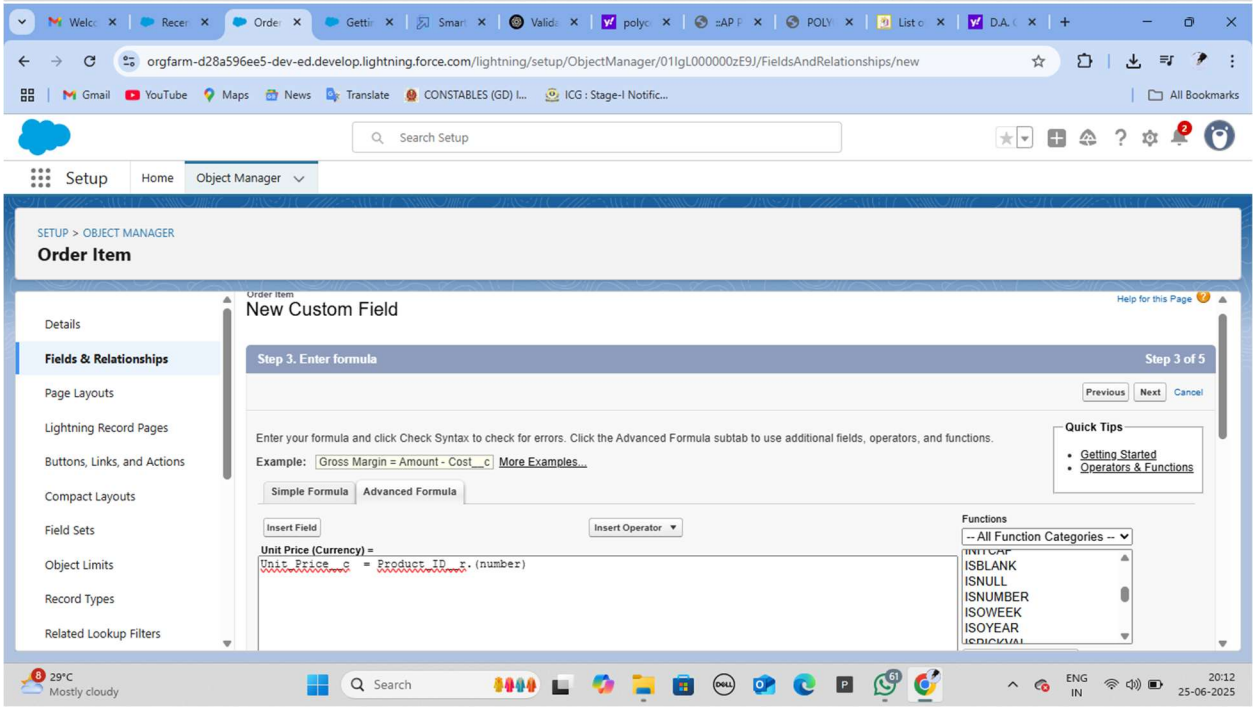
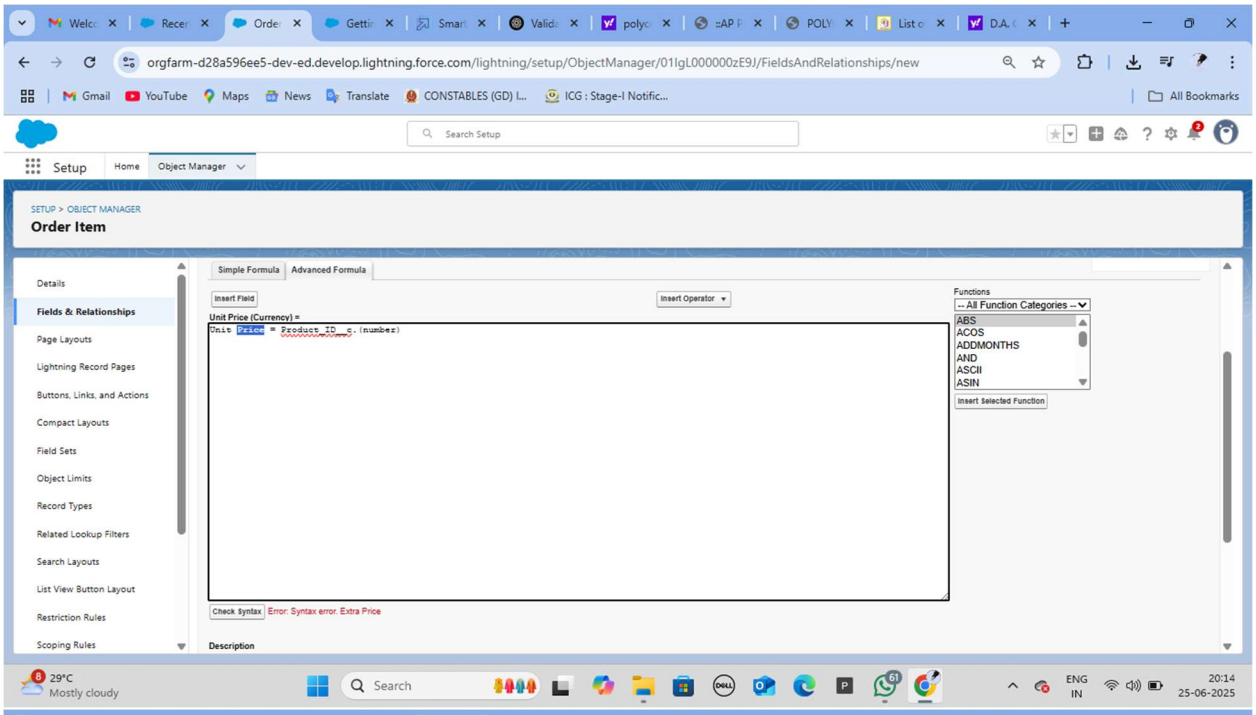
Next
Cancel
Field Label Supplier
Data Type Lookup
Field Name Supplier_ID
Description
Select the profiles to which you want to grant edit access to this field via field-level security. The field will be hidden from all profiles if you do not add it to field-level security.
Field-Level Security for Profile
Visible
Read-Only
Analytics Cloud Integration User
Analytics Cloud Security User
Anypoint Integration
Authenticated Website
Authenticated Website
B2B Reordering Portal Buyer Profile
Contract Manager
29°C
Mostly cloudy
Search
ENG
IN
14:07
25-06-2025

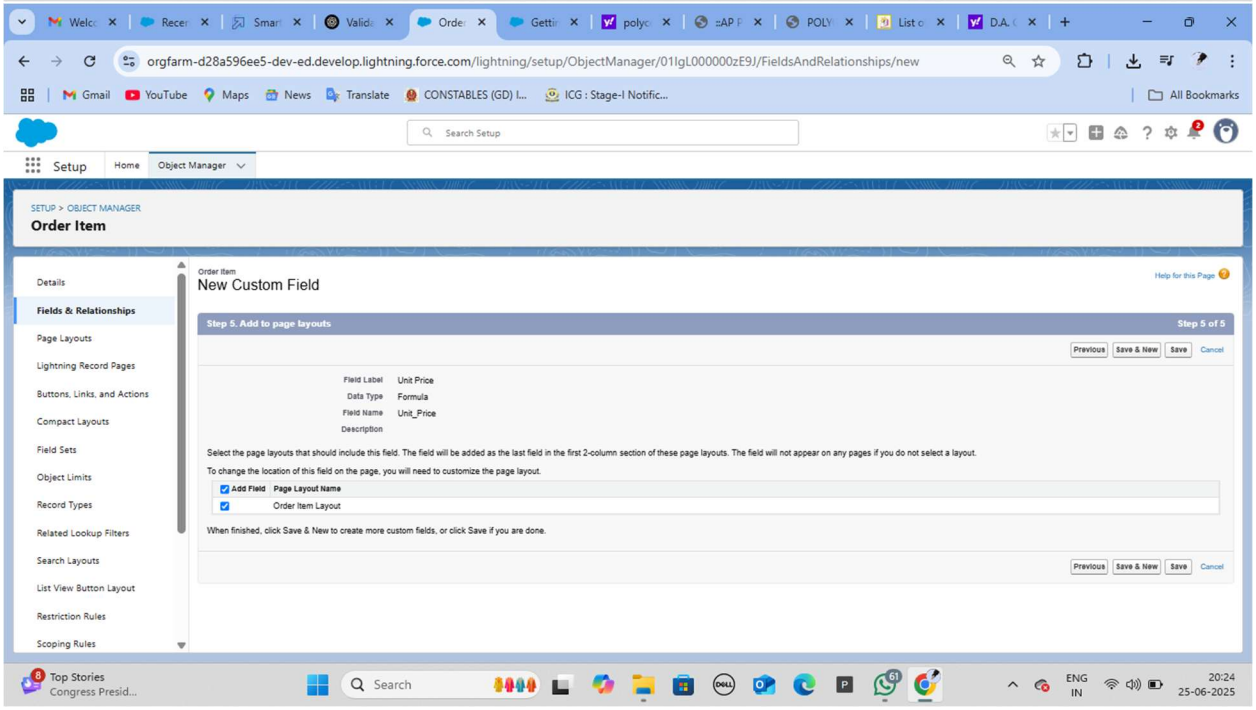

Home | Salesforce
Purchase Order Validation Rule
orgfarm-d28a596ee5-dev-ed.develop.lightning.force.com/lightning/setup/null/page?address=%2F03d%2Fe%3FretURL%3D%252Fsetup%252FObjectManager%252F...
Search Setup
Setup
Home
Object Manager
Quick Find
Setup Home
Salesforce Go
Service Setup Assistant
Commerce Setup Assistant
Field Service Setup Home (Beta)
Hyperforce Assistant
Release Updates
Salesforce Mobile App
Lightning Usage
Optimizer
Sales Cloud Everywhere
ADMINISTRATION
Users
SETUP
Purchase Order Validation Rule
Help for this Page
Define a validation rule by specifying an error condition and a corresponding error message. The error condition is written as a Boolean formula expression that returns true or false. When the formula expression returns true, the save will be aborted and the error message will be displayed. The user can correct the error and try again.
Validation Rule Edit
Save
Save & New
Cancel
Rule Name Order_Count
Active
Description
Quick Tips
Operators & Functions
Error Condition Formula
= Required Information
Example: Discount_Percent__c>0.30
More Examples...
Display an error if Discount is more than 30%
If this formula expression is true, display the text defined in the Error Message area
Functions
-- All Function Categories --
UNIXTIMESTAMP
UPPER
Insert Field
Insert Operator
33°C
Mostly cloudy
Search
ENG
IN
15:58
25-06-2025

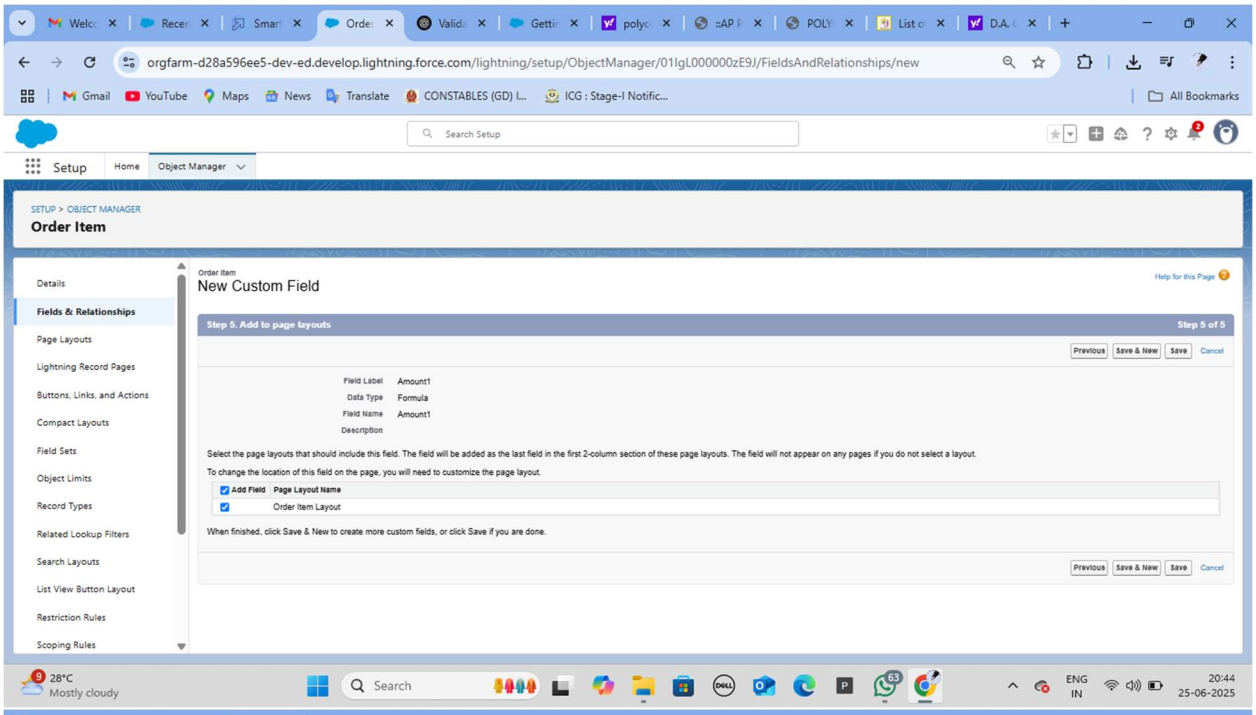

Welcome to Salesforce: Rese
Recently Viewed | Purchase
Smartinternz
Home | Salesforce
Purchase Order Validation R
orgfarm-d28a596ee5-dev-ed.develop.lightning.force.com/lightning/setup/null/page?address=%2F03d%2Fe%3FretURL%3D%252Fsetup%252FObjectManager%252F...
Gmail
YouTube
Maps
News
Translate
CONSTABLES (GD) I...
ICG : Stage-I Notific...
All Bookmarks
Search Setup
Setup
Home
Object Manager
Quick Find
Setup Home
Salesforce Go
Service Setup Assistant
Commerce Setup Assistant
Field Service Setup Home (Beta)
Hyperforce Assistant
Release Updates
Salesforce Mobile App
Lightning Usage
Optimizer
Sales Cloud Everywhere
ADMINISTRATION
Users
SETUP
Example: Discount_Percent__c>0.30 More Examples...
Display an error if Discount is more than 30%
If this formula expression is true, display the text defined in the Error Message area
Insert Field
Insert Operator
Functions
-- All Function Categories --
UNIXTIMESTAMP
UPPER
VALUE
VLOOKUP
WEEKDAY
YEAR
Insert Selected Function
ABS(number)
Returns the absolute value of a number, a number without its sign
Help on this function
Check Syntax
Error Message
Example: Discount percent cannot exceed 30%
This message will appear when Error Condition formula is true
Error Message
This error message can either appear at the top of the page or below a specific field on the page
Error Location
Top of Page
Field
Purchase Order ID
Save
Save & New
Cancel
33°C
Mostly cloudy
Search
ENG
IN
15:58
25-06-2025

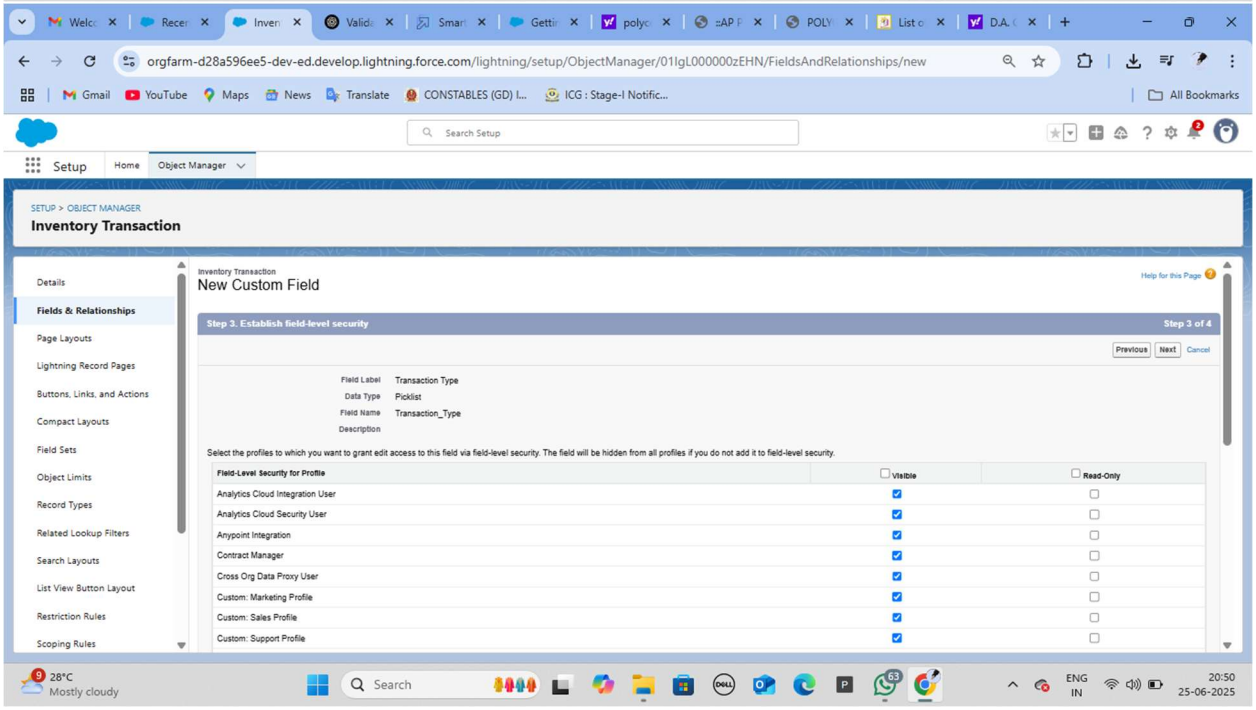

Welcome to Salesforce: Rese
Recently Viewed | Purchase
Smartinternz
Validation Rule Creation
Home | Salesforce
orgfarm-d28a596ee5-dev-ed.develop.lightning.force.com/lightning/setup/null/page?address=%2F03d%2Fe%3FretURL%3D%252Fsetup%252FObjectManager%252F...
Gmail
YouTube
Maps
News
Translate
CONSTABLES (GD) I...
ICG : Stage-I Notific...
All Bookmarks
Search Setup
Setup
Home
Object Manager
Quick Find
Setup Home
Salesforce Go
Service Setup Assistant
Commerce Setup Assistant
Field Service Setup Home (Beta)
Hyperforce Assistant
Release Updates
Salesforce Mobile App
Lightning Usage
Optimizer
Sales Cloud Everywhere
ADMINISTRATION
Users
SETUP
Error Condition Formula
= Required Information
Example: Discount_Percent__c>0.30
More Examples...
Display an error if Discount is more than 30%
If this formula expression is true, display the text defined in the Error Message area
Insert Field
Insert Operator
Functions
-- All Function Categories --
ABS
ACOS
ADDMONTHS
AND
ASCII
ASIN
Insert Selected Function
ABS(number)
Returns the absolute value of a number, a number without its sign
Help on this function
Error: You must enter a value
Check Syntax
Error Message
33°C
Mostly cloudy
Search
ENG
IN
16:05
25-06-2025

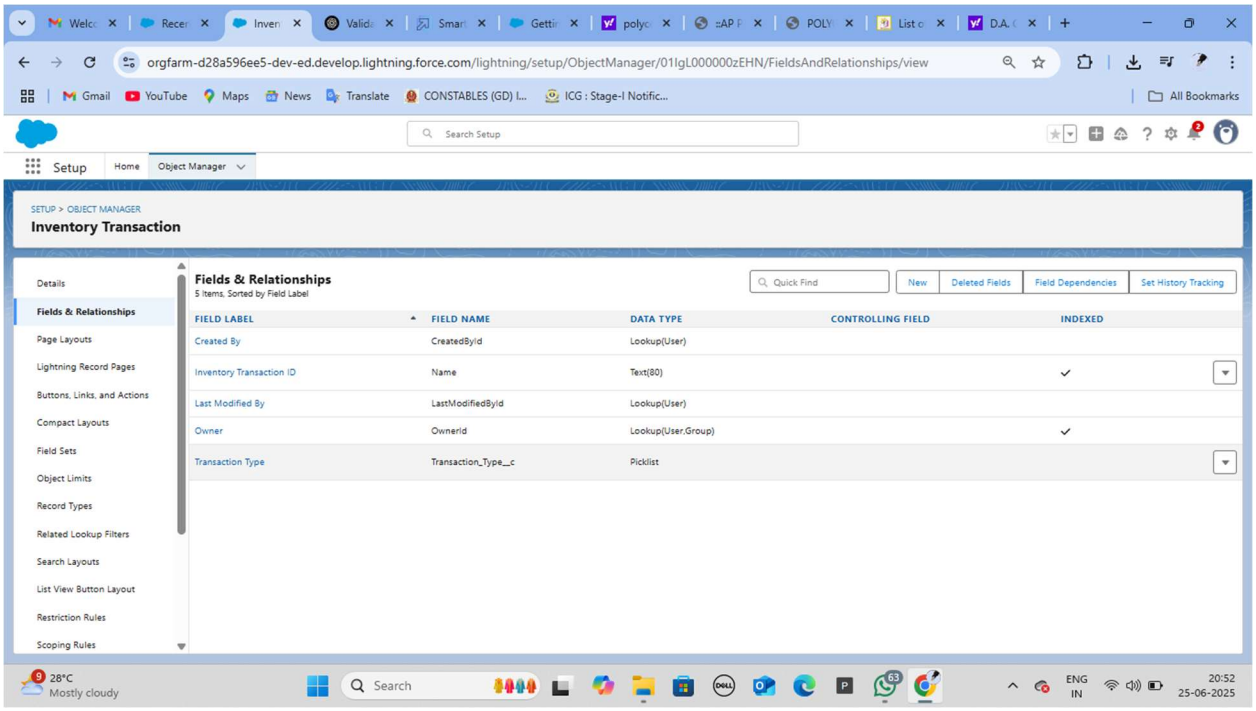

orgfarm-d28a596ee5-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IgL000000zE9J/FieldsAndRelationships/new
Gmail
YouTube
Maps
News
Translate
CONSTABLES (GD) I...
ICG : Stage-I Notific...
All Bookmarks
Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Order Item
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Order Item
New Custom Field
Help for this Page
Step 3. Enter formula
Step 3 of 5
Previous
Next
Cancel
Enter your formula and click Check Syntax to check for errors. Click the Advanced Formula subtab to use additional fields, operators, and functions.
Example: Gross Margin = Amount - Cost__c
More Examples...
Quick Tips
Getting Started
Operators & Functions
Simple Formula
Advanced Formula
Insert Field
Insert Operator
Unit Price (Currency) =
Unit_Price__c = Product_ID__r.(number)
Functions
-- All Function Categories --
ISBLANK
ISNULL
ISNUMBER
ISOWEEK
ISOYEAR
29°C
Mostly cloudy
Search
ENG
IN
20:12
25-06-2025

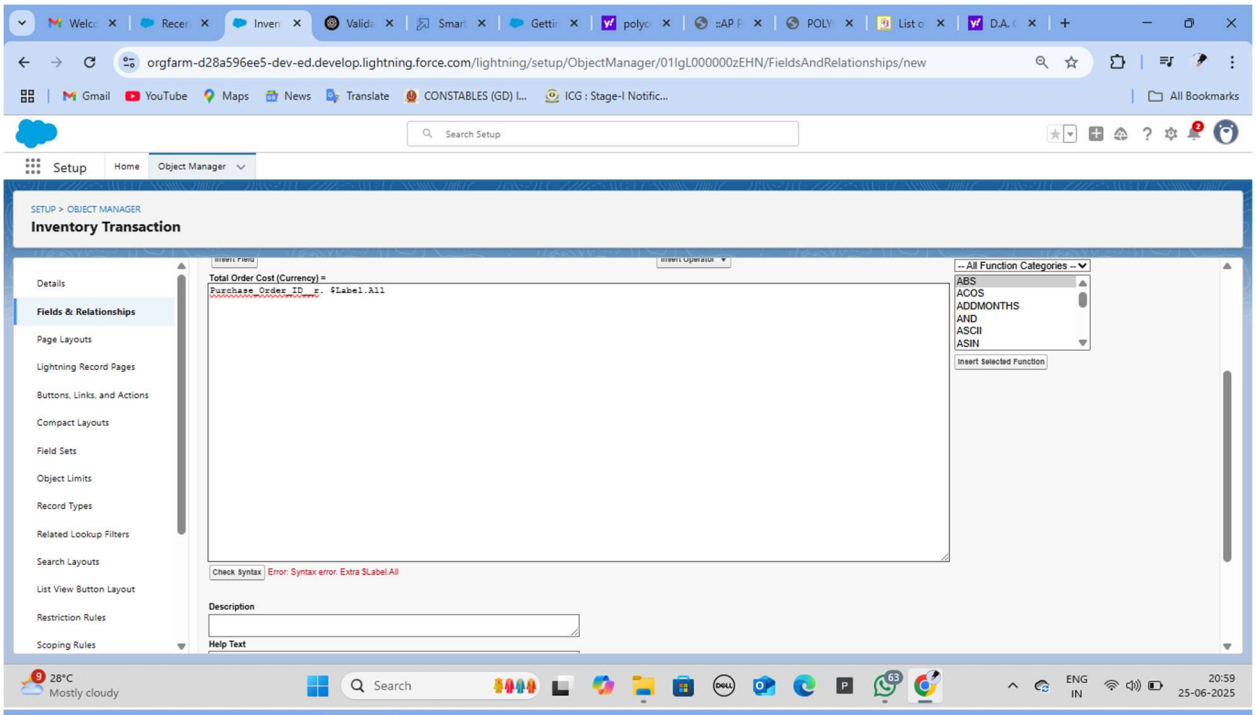

orgfarm-d28a596ee5-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IgL000000zE9J/FieldsAndRelationships/new
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Order Item
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Scoping Rules
Simple Formula
Advanced Formula
Insert Field
Insert Operator
Unit Price (Currency) =
Unit_Price = Product_ID__c.(number)
Functions
-- All Function Categories --
ABS
ACOS
ADDMONTHS
AND
ASCII
ASIN
Insert Selected Function
Check Syntax
Error: Syntax error. Extra Price
Description
29°C
Mostly cloudy
Search
ENG
IN
20:14
25-06-2025

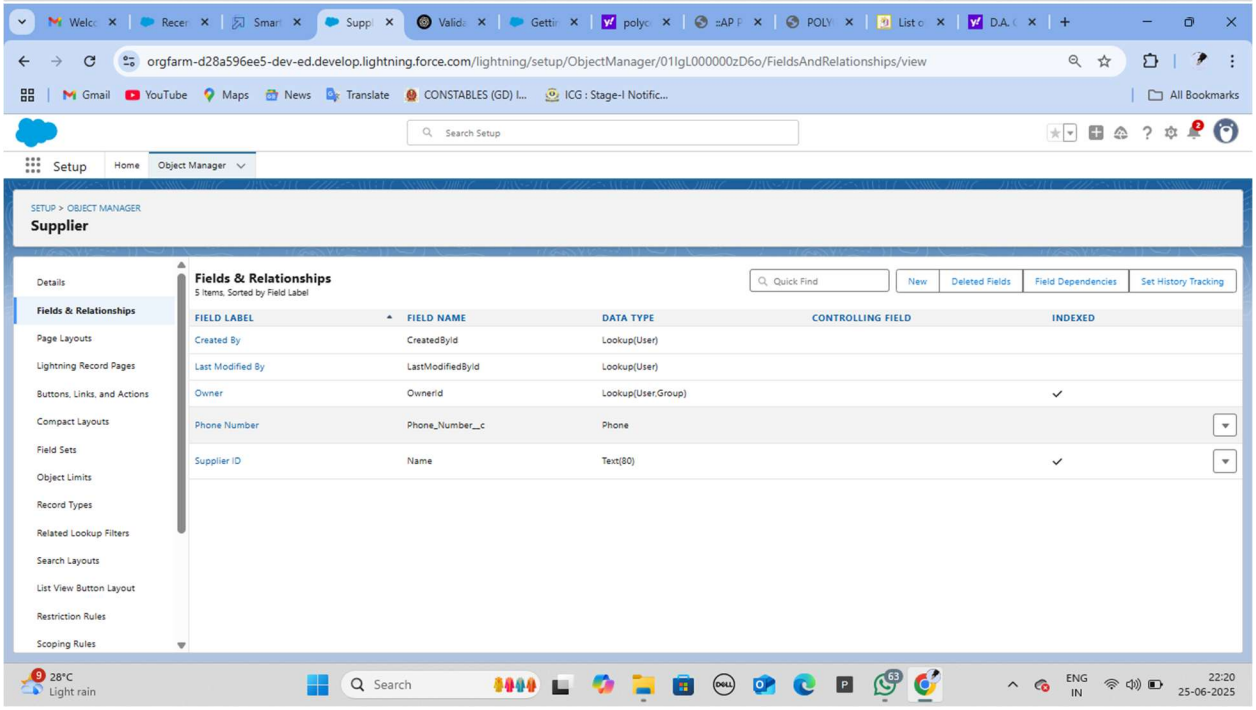

orgfarm-d28a596ee5-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IgL000000zE9J/FieldsAndRelationships/new
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Order Item
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Scoping Rules
Order Item
New Custom Field
Help for this Page
Step 5. Add to page layouts
Step 5 of 5
Previous
Save & New
Save
Cancel
Field Label
Unit Price
Data Type
Formula
Field Name
Unit_Price
Description
Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.
To change the location of this field on the page, you will need to customize the page layout.
Add Field
Page Layout Name
Order Item Layout
When finished, click Save & New to create more custom fields, or click Save if you are done.
Top Stories
Congress Presid...
Search
ENG
IN
20:24
25-06-2025

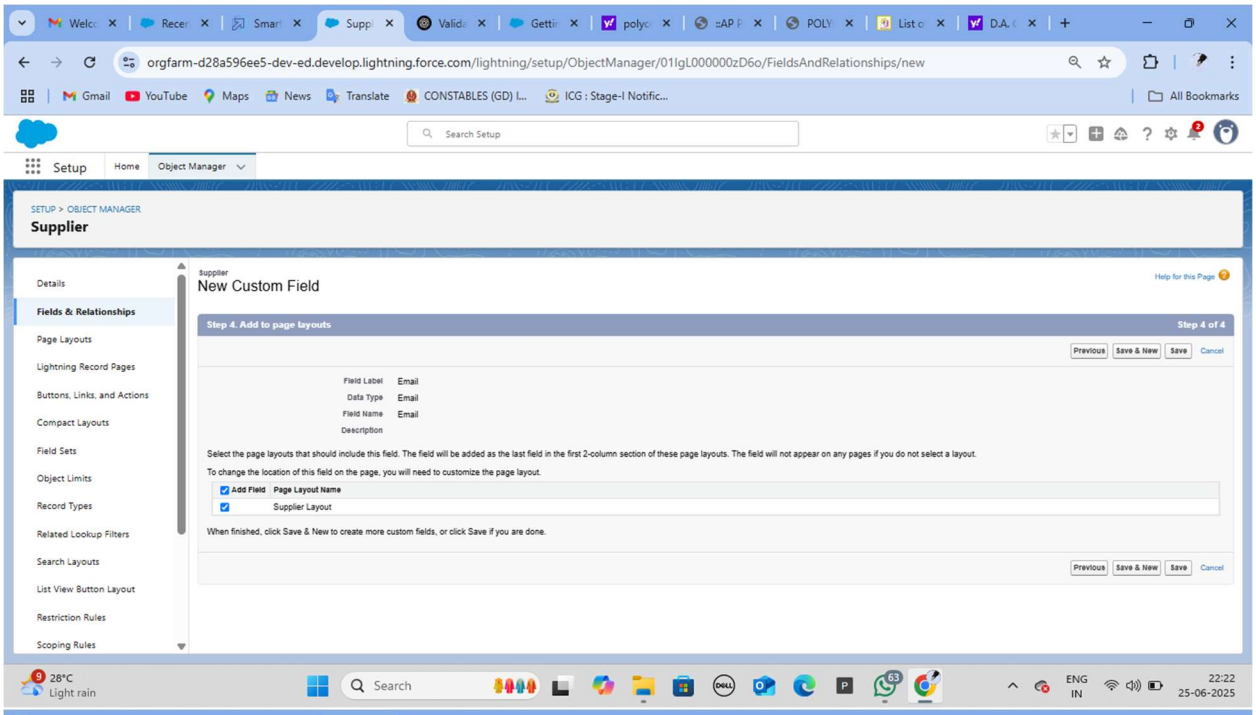

orgfarm-d28a596ee5-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IgL000000zE9J/FieldsAndRelationships/new
Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Order Item
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Scoping Rules
Order Item
New Custom Field
Help for this Page
Step 5. Add to page layouts
Step 5 of 5
Previous
Save & New
Save
Cancel
Field Label Amount1
Data Type Formula
Field Name Amount1
Description
Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.
To change the location of this field on the page, you will need to customize the page layout.
Add Field
Page Layout Name
Order Item Layout
When finished, click Save & New to create more custom fields, or click Save if you are done.
28°C
Mostly cloudy
Search
ENG
IN
20:44
25-06-2025

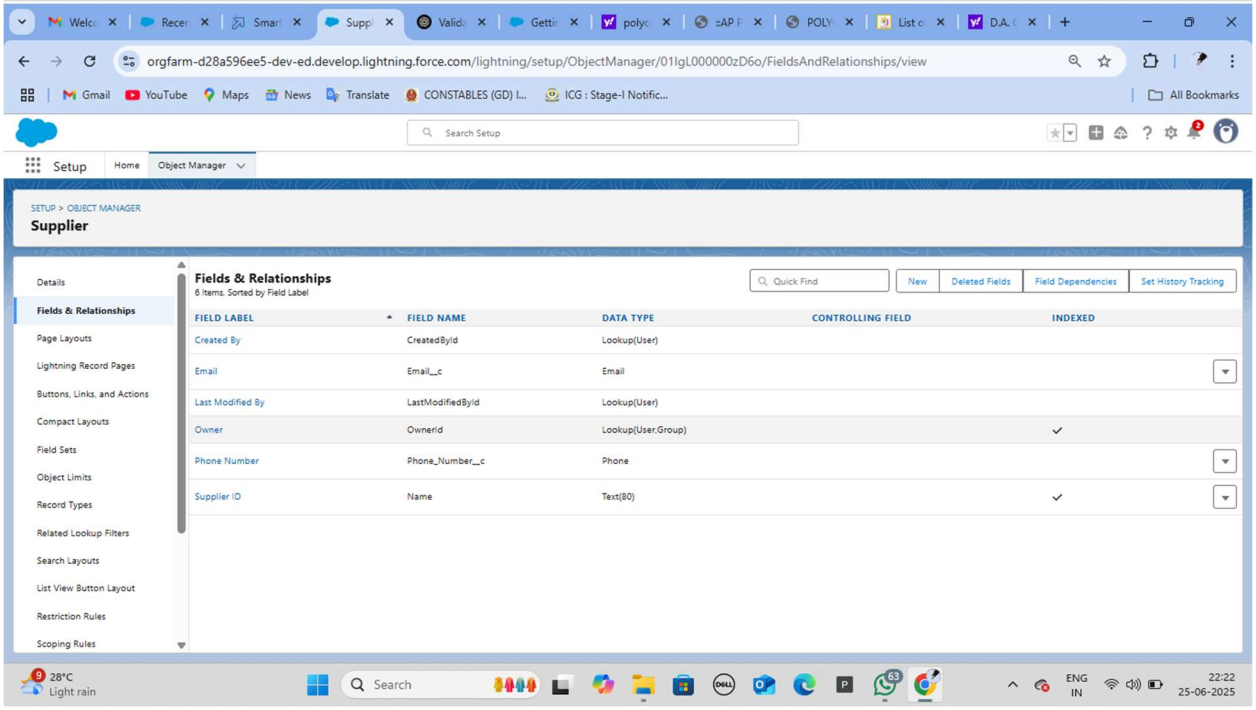

orgfarm-d28a596ee5-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IgL000000zEHN/FieldsAndRelationships/new
Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Inventory Transaction
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Scoping Rules
Inventory Transaction
New Custom Field
Help for this Page
Step 3. Establish field-level security
Step 3 of 4
Previous
Next
Cancel
Field Label Transaction Type
Data Type Picklist
Field Name Transaction_Type
Description
Select the profiles to which you want to grant edit access to this field via field-level security. The field will be hidden from all profiles if you do not add it to field-level security.
Field-Level Security for Profile
Visible
Read-Only
Analytics Cloud Integration User
Analytics Cloud Security User
Anypoint Integration
Contract Manager
Cross Org Data Proxy User
Custom: Marketing Profile
Custom: Sales Profile
Custom: Support Profile
28°C
Mostly cloudy
Search
ENG
IN
20:50
25-06-2025

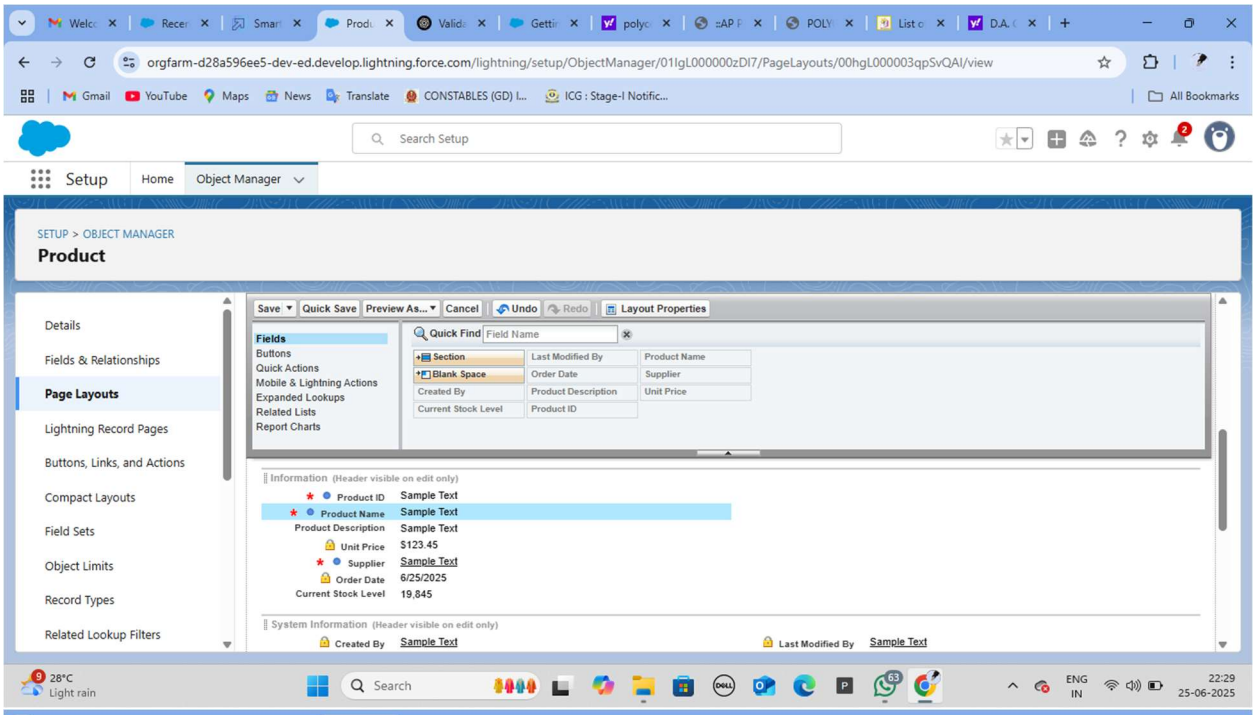

orgfarm-d28a596ee5-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IgL000000zEHN/FieldsAndRelationships/view
Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Inventory Transaction
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Scoping Rules
Fields & Relationships
5 items, Sorted by Field Label
Quick Find
New
Deleted Fields
Field Dependencies
Set 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)
Transaction Type
Transaction_Type__c
Picklist
28°C
Mostly cloudy
Search
ENG
IN
20:52
25-06-2025

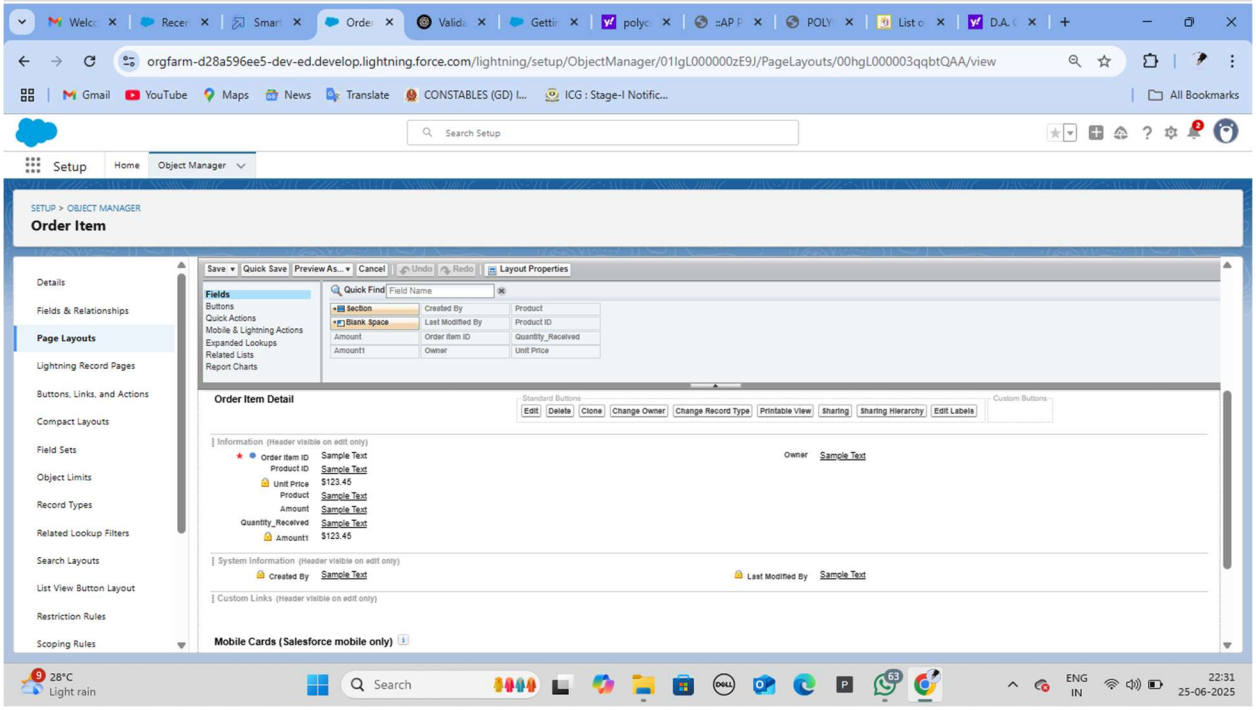

orgfarm-d28a596ee5-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IgL000000zEHN/FieldsAndRelationships/new
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Inventory Transaction
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Scoping Rules
Total Order Cost (Currency) =
Purchase_Order_ID__r. $Label.All
-- All Function Categories --
ABS
ACOS
ADDMONTHS
AND
ASCII
ASIN
Insert Selected Function
Check Syntax
Error: Syntax error. Extra $Label.All
Description
Help Text
28°C
Mostly cloudy
Search
ENG
IN
20:59
25-06-2025

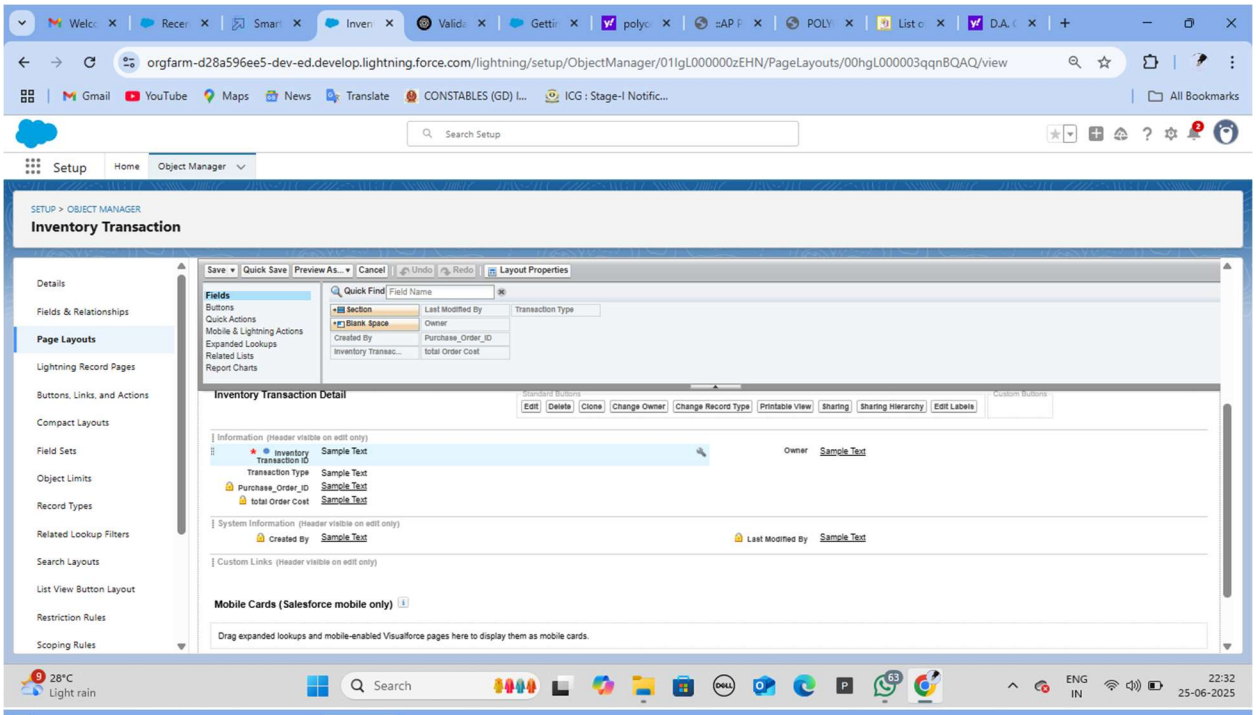

orgfarm-d28a596ee5-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IgL000000zD6o/FieldsAndRelationships/view
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Supplier
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Scoping Rules
Fields & Relationships
5 Items, Sorted by Field Label
Quick Find
New
Deleted Fields
Field Dependencies
Set History Tracking
FIELD LABEL
FIELD NAME
DATA TYPE
CONTROLLING FIELD
INDEXED
Created By
CreatedById
Lookup(User)
Last Modified By
LastModifiedById
Lookup(User)
Owner
OwnerId
Lookup(User,Group)
Phone Number
Phone_Number__c
Phone
Supplier ID
Name
Text(80)
28°C
Light rain
Search
ENG
IN
22:20
25-06-2025

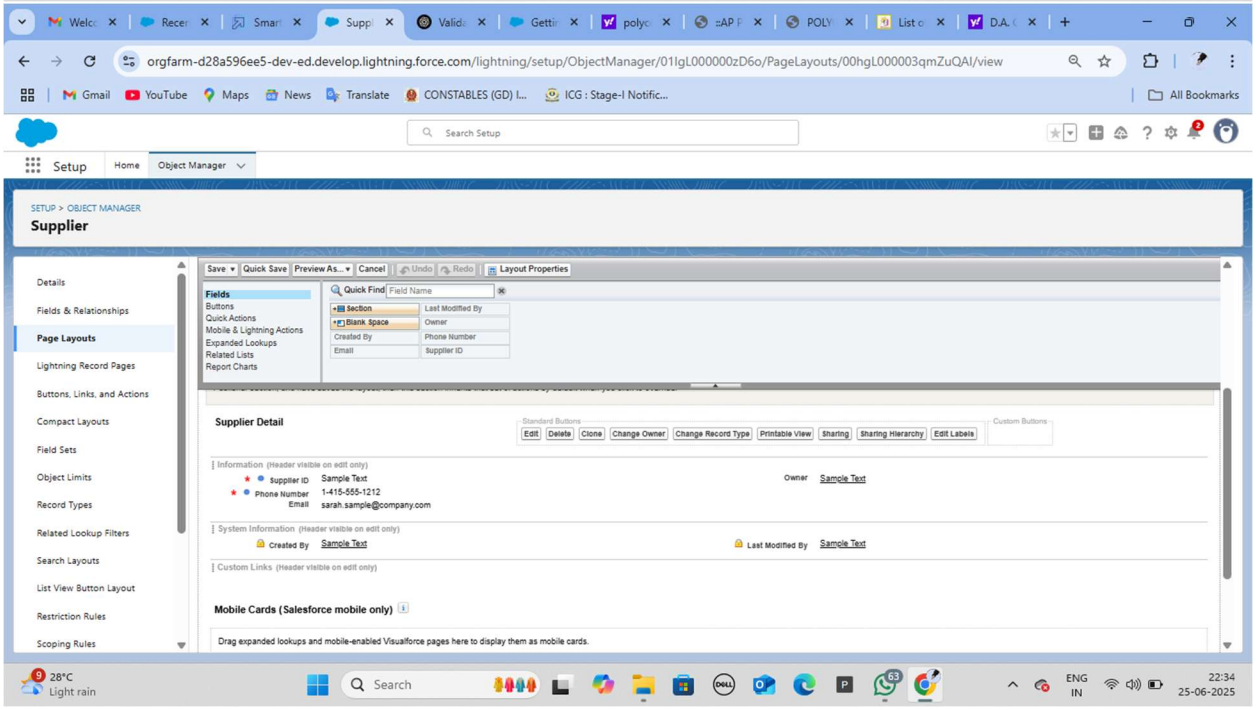

orgfarm-d28a596ee5-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IgL000000zD6o/FieldsAndRelationships/new
Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Supplier
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Scoping Rules
Supplier
New Custom Field
Help for this Page
Step 4. Add to page layouts
Step 4 of 4
Previous
Save & New
Save
Cancel
Field Label Email
Data Type Email
Field Name Email
Description
Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.
To change the location of this field on the page, you will need to customize the page layout.
Add Field
Page Layout Name
Supplier Layout
When finished, click Save & New to create more custom fields, or click Save if you are done.
28°C
Light rain
Search
ENG
IN
22:22
25-06-2025


orgfarm-d28a596ee5-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IgL000000zD6o/FieldsAndRelationships/view
Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Supplier
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
Fields & Relationships
6 items, Sorted by Field Label
Quick Find
New
Deleted Fields
Field Dependencies
Set History Tracking
FIELD LABEL
FIELD NAME
DATA TYPE
CONTROLLING FIELD
INDEXED
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 ID
Name
Text(80)
28°C
Light rain
Search
ENG
IN
22:22
25-06-2025


orgfarm-d28a596ee5-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IgL000000zDI7/PageLayouts/00hgL000003qpSvQAI/view
Search Setup
Setup
Home
Object Manager
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
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
Blank Space
Last Modified By
Product Name
Order Date
Supplier
Created By
Product Description
Unit Price
Current Stock Level
Product ID
Information (Header visible on edit only)
Product ID
Sample Text
Product Name
Sample Text
Product Description
Sample Text
Unit Price
$123.45
Supplier
Sample Text
Order Date
6/25/2025
Current Stock Level
19,845
System Information (Header visible on edit only)
Created By
Sample Text
Last Modified By
Sample Text
28°C
Light rain
Search
ENG
IN
22:29
25-06-2025


orgfarm-d28a596ee5-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IgL000000zE9J/PageLayouts/00hgL000003qqbtQAA/view
Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Order Item
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Scoping Rules
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
Blank Space
Created By
Product
Last Modified By
Product ID
Amount
Order Item ID
Quantity_Received
Amount1
Owner
Unit Price
Order Item Detail
Standard Buttons
Edit
Delete
Clone
Change Owner
Change Record Type
Printable View
Sharing
Sharing Hierarchy
Edit Labels
Custom Buttons
Information (Header visible on edit only)
Order Item ID
Sample Text
Product ID
Sample Text
Unit Price
$123.45
Product
Sample Text
Amount
Sample Text
Quantity_Received
Sample Text
Amount1
$123.45
Owner
Sample Text
System Information (Header visible on edit only)
Created By
Sample Text
Last Modified By
Sample Text
Custom Links (Header visible on edit only)
Mobile Cards (Salesforce mobile only)
28°C
Light rain
Search
ENG
IN
22:31
25-06-2025


orgfarm-d28a596ee5-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IgL000000zEHN/PageLayouts/00hgL000003qqnBQAQ/view
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Inventory Transaction
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Scoping Rules
Inventory Transaction Detail
Mobile Cards (Salesforce mobile only)
Drag expanded lookups and mobile-enabled Visualforce pages here to display them as mobile cards.


orgfarm-d28a596ee5-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IgL000000zD6o/PageLayouts/00hgL000003qmZuQAI/view
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Supplier
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
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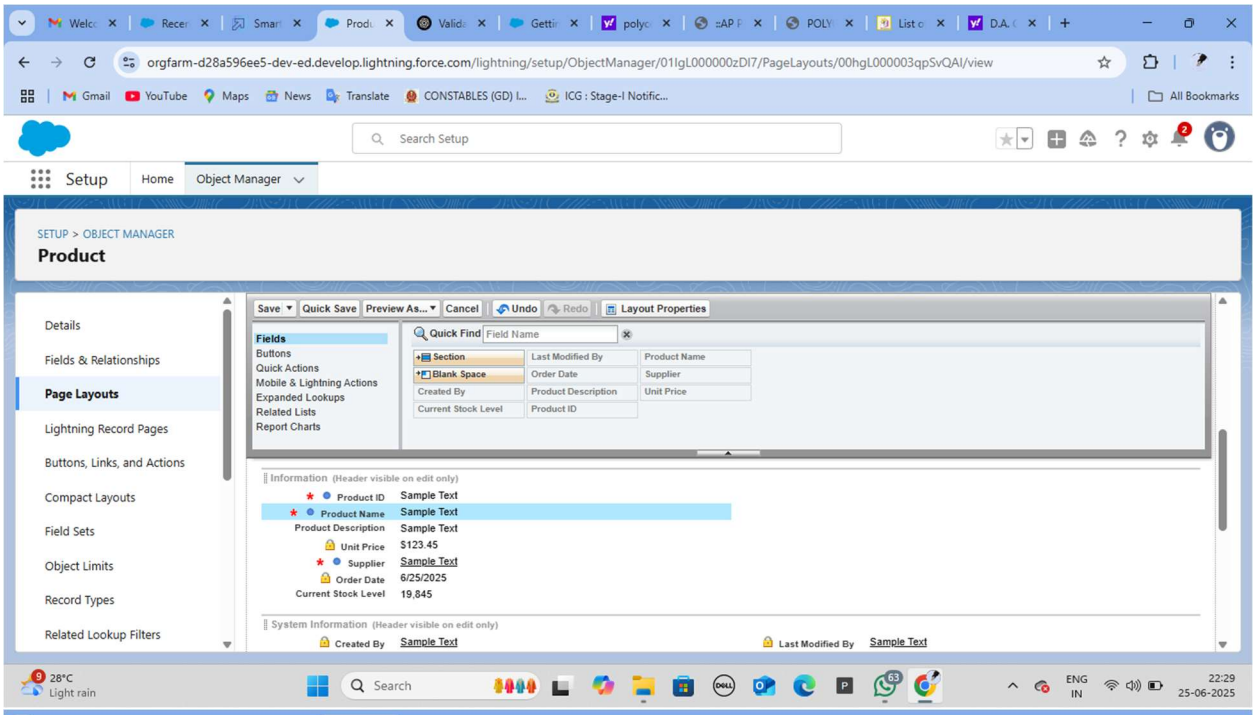
Drag expanded lookups and mobile-enabled Visualforce pages here to display them as mobile cards.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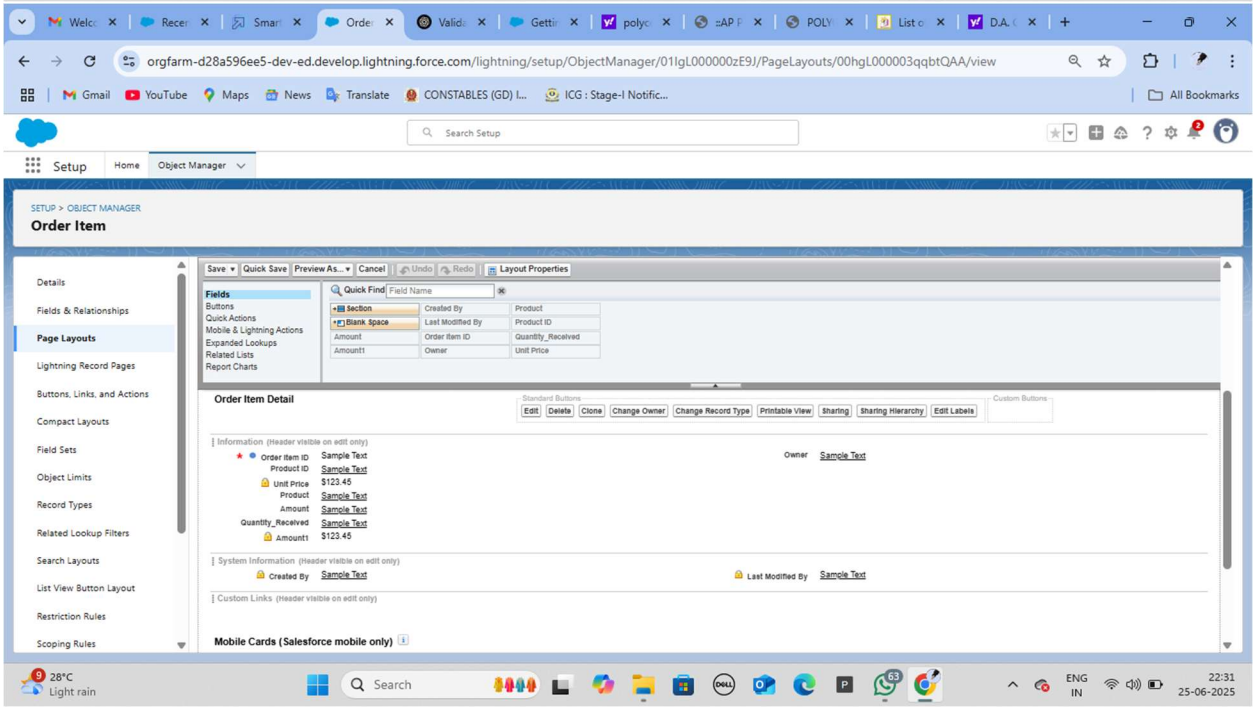
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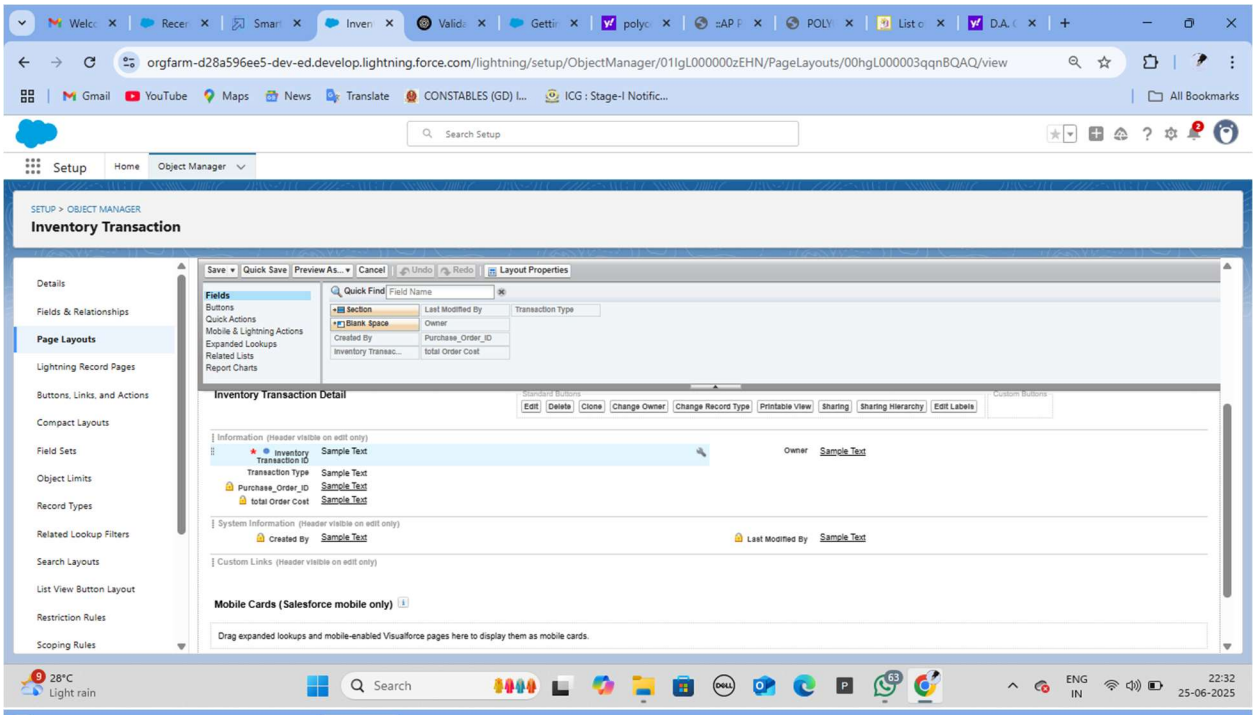
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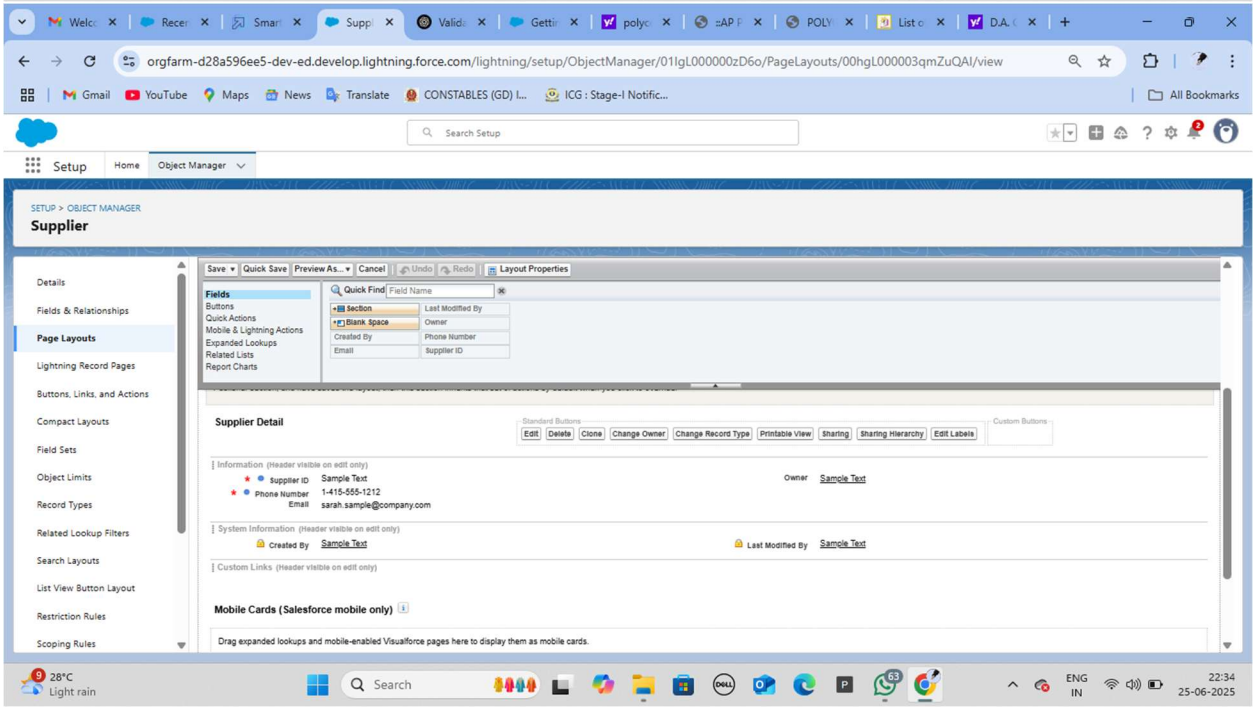
Mobile Cards (Salesforce mobile only)
Drag expanded lookups and mobile-enabled Visualforce pages here to display them as mobile cards.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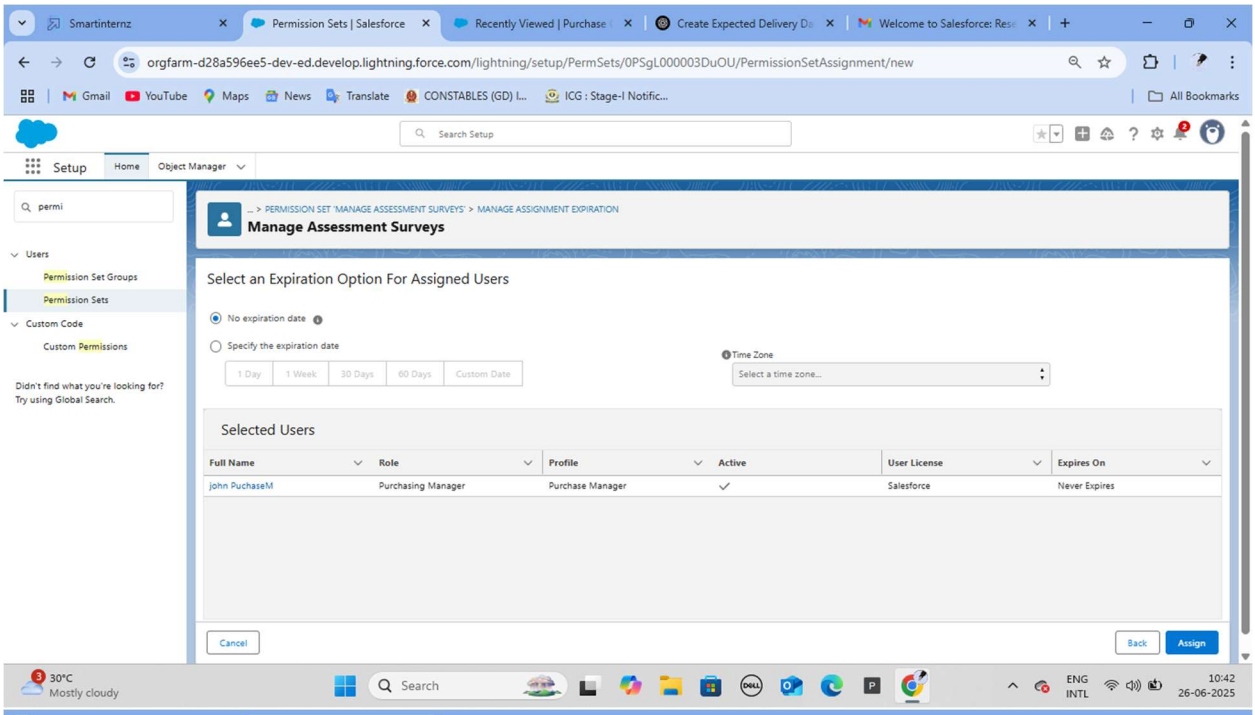
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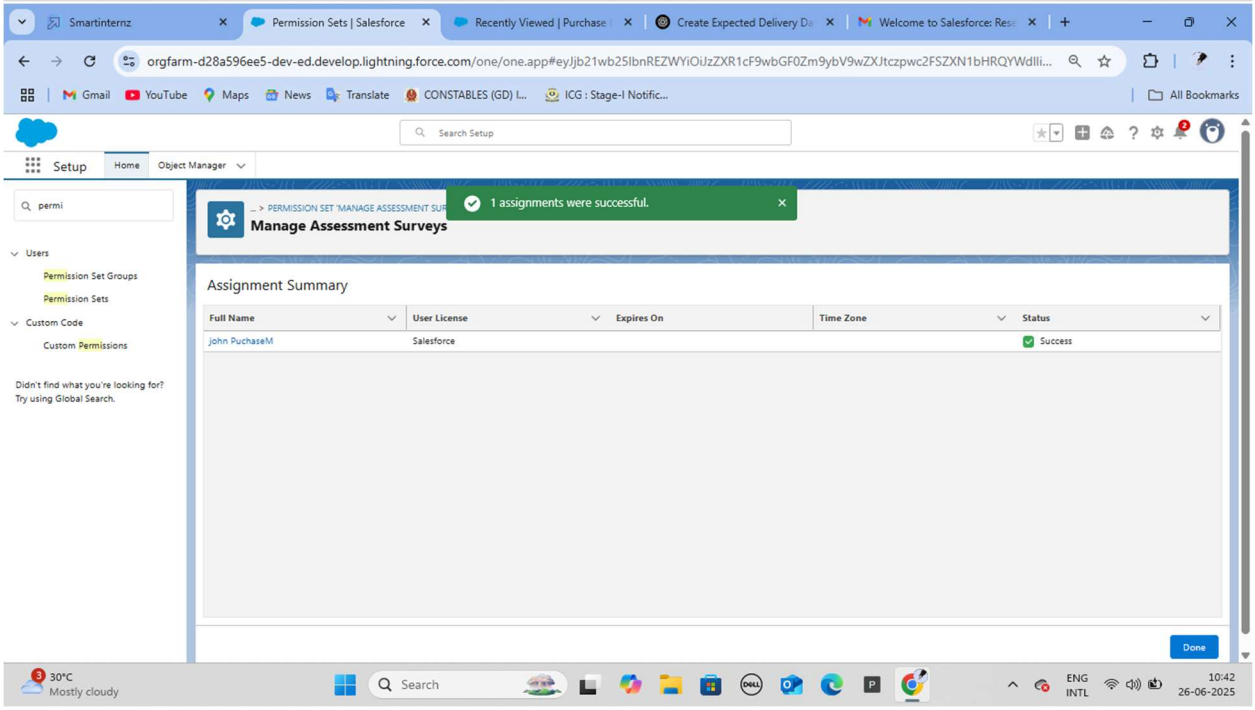
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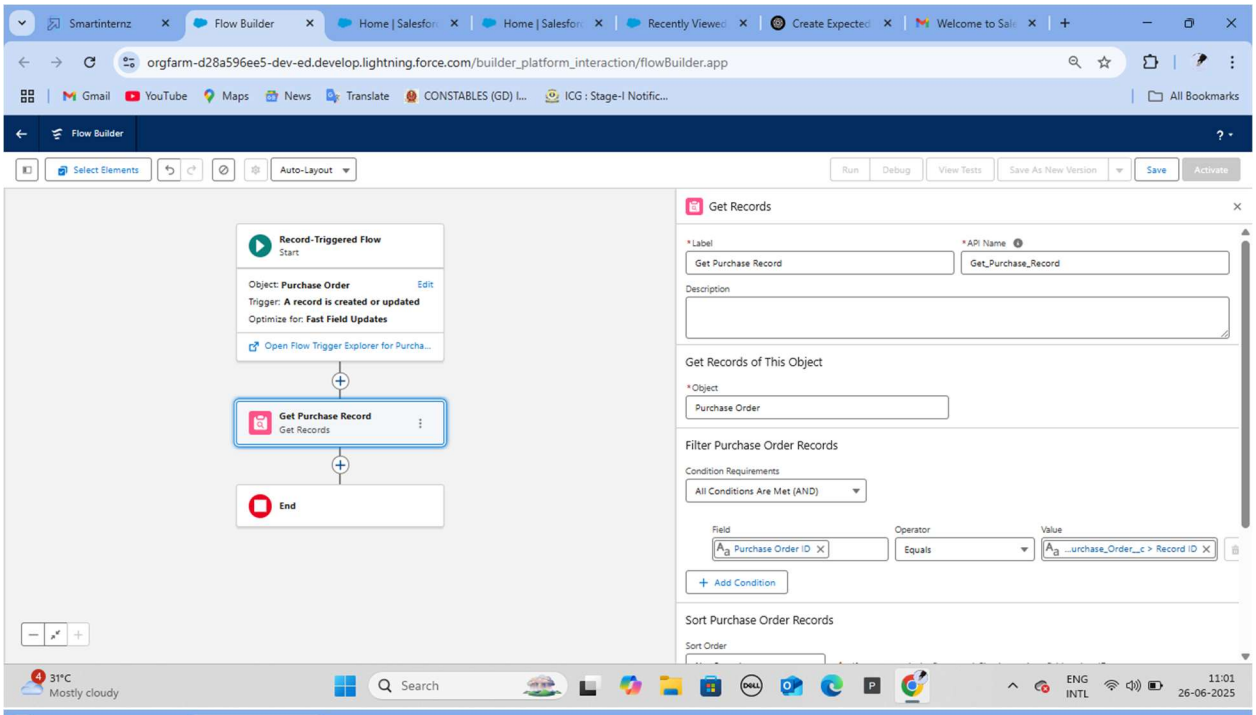
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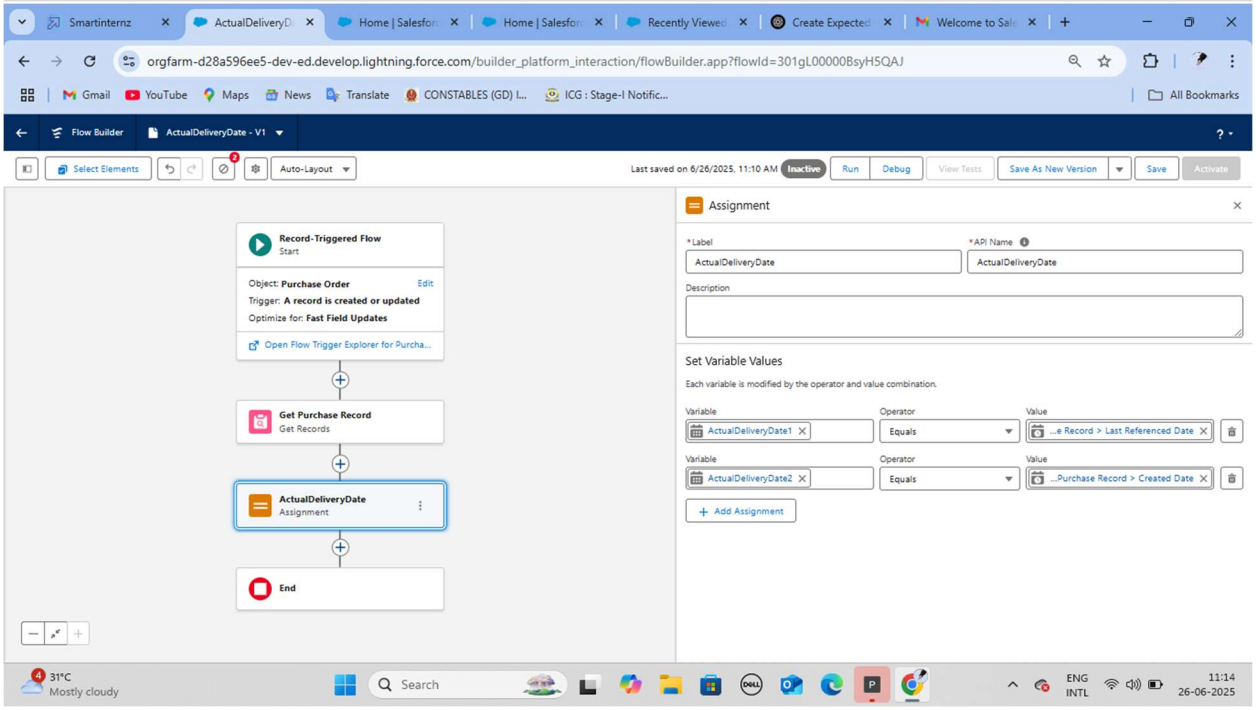
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Edit
Trigger: A record is created or updated
Optimize for: Fast Field Updates
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Get Records
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Description
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Each variable is modified by the operator and value combination.
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ActualDeliveryDate1
Equals
...e Record > Last Referenced Date
Variable
Operator
Value
ActualDeliveryDate2
Equals
...Purchase Record > Created Date
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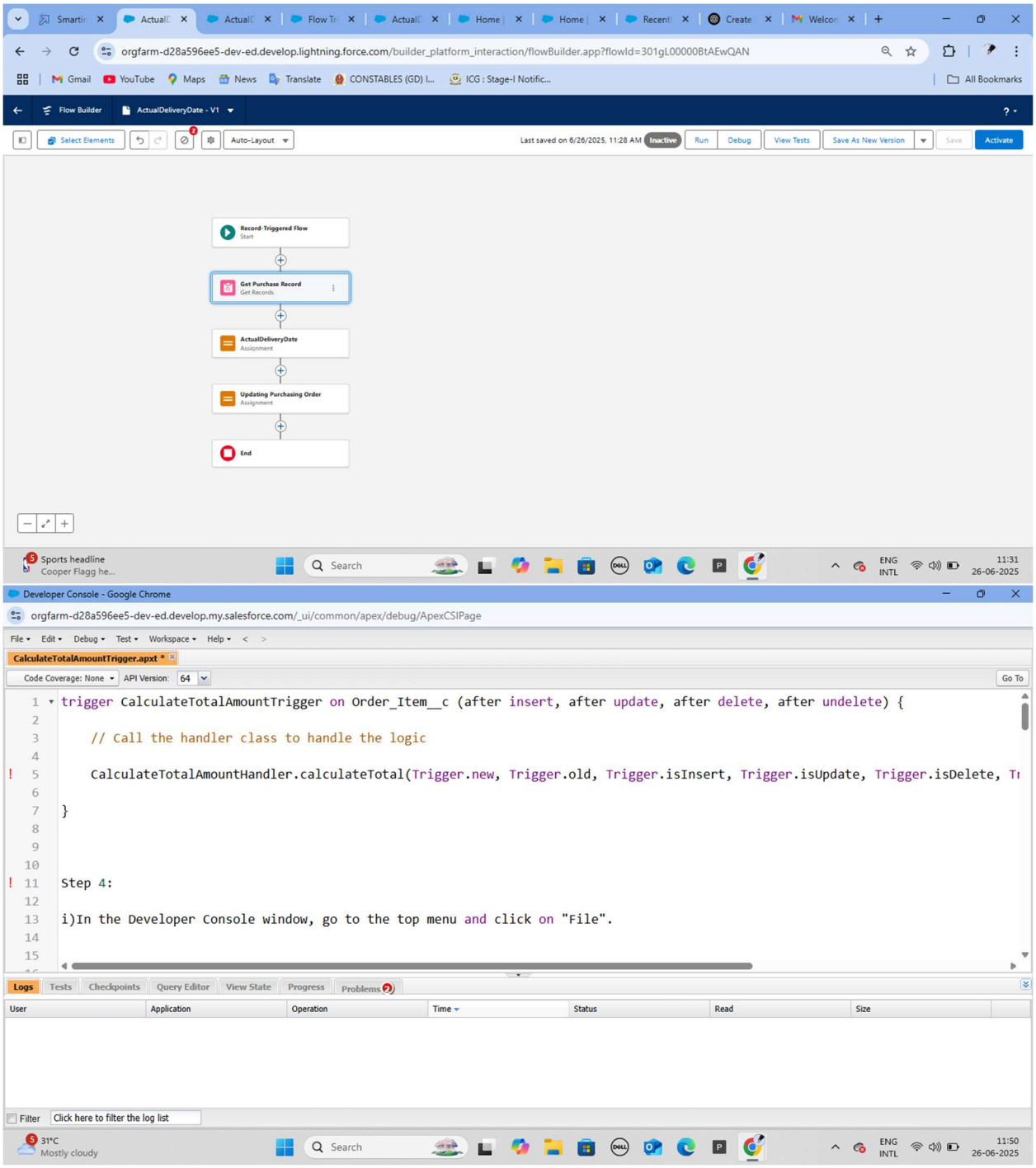
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Developer Console - Google Chrome
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Code Coverage: None
API Version:
64
Go To
1 trigger CalculateTotalAmountTrigger on Order_Item__c (after insert, after update, after delete, after undelete) {
2
3 // Call the handler class to handle the logic
4
5 CalculateTotalAmountHandler.calculateTotal(Trigger.new, Trigger.old, Trigger.isInsert, Trigger.isUpdate, Trigger.isDelete, Tr
6
7 }
8
9
10
11 Step 4:
12
13 i)In the Developer Console window, go to the top menu and click on "File".
14
15
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Checkpoints
Query Editor
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Progress
Problems
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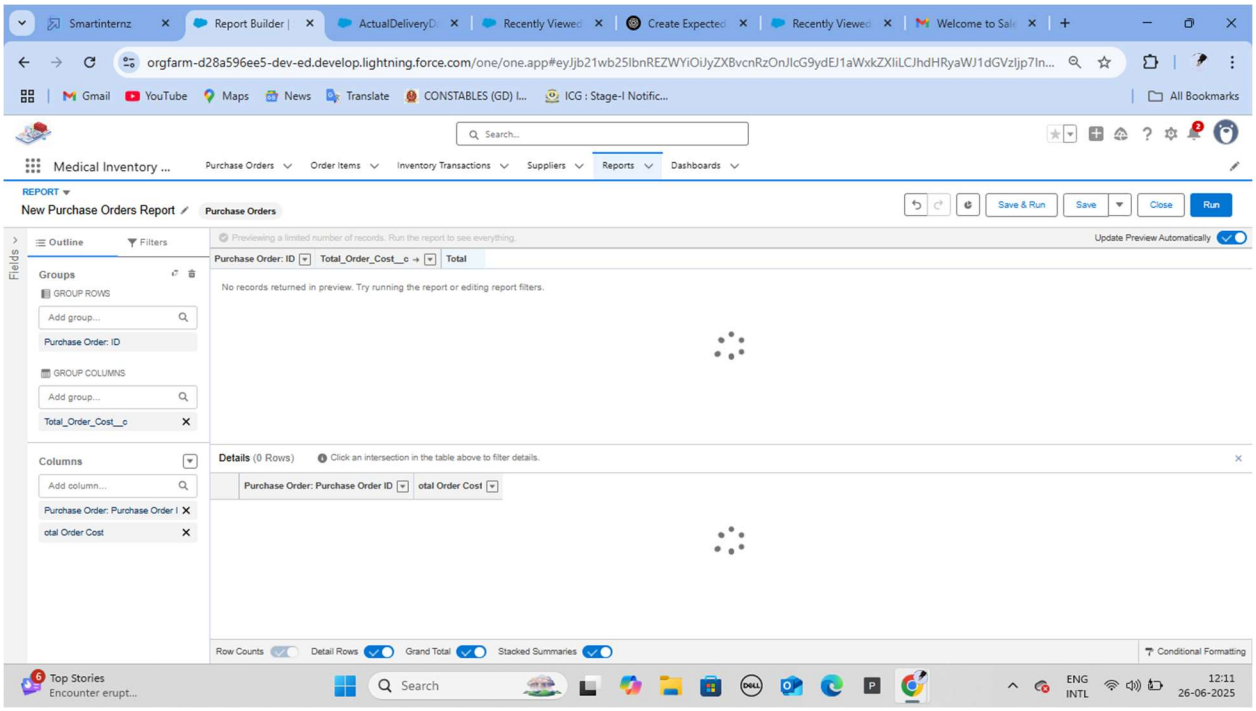
Medical Inventory ...
Purchase Orders
Order Items
Inventory Transactions
Suppliers
Reports
Dashboards
REPORT
New Purchase Orders Report
Purchase Orders
Save & Run
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Purchase Order: ID
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No records returned in preview. Try running the report or editing report filters.
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Click an intersection in the table above to filter details.
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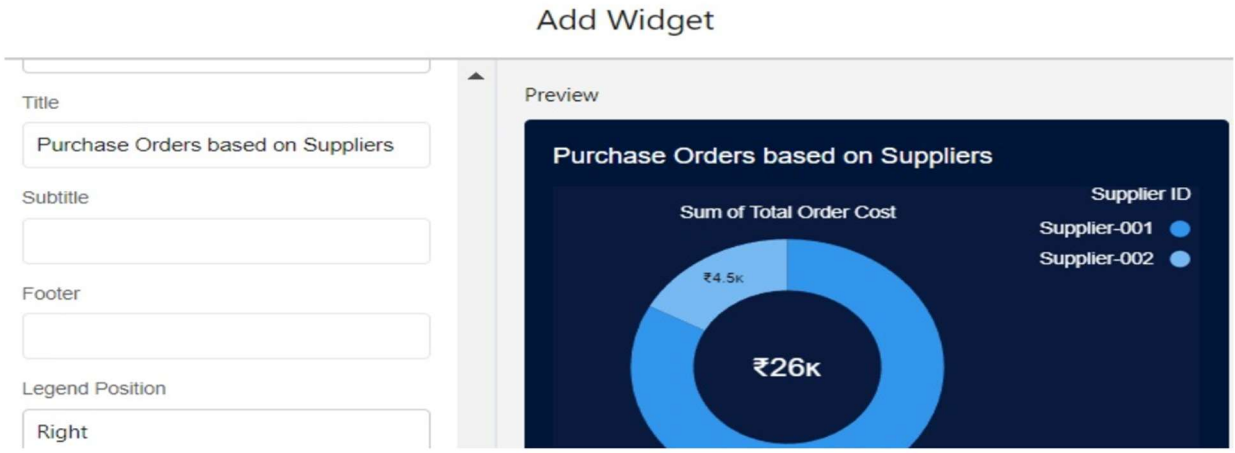
Add Widget
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Sum of Total Order Cost
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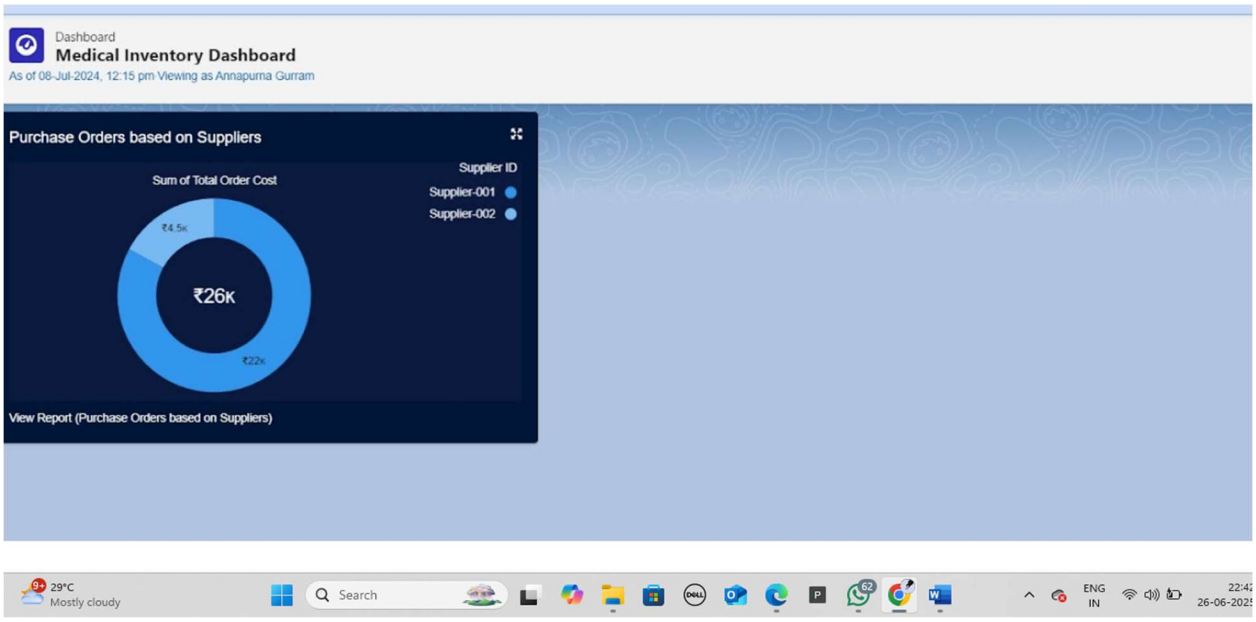
FINAL OUT PUT:



7.ADVANTAGES & DISADVANTAGES :

7.1Comparative Analysis: Before vs After Implementation :

Criteria	Before Implementation	After Implementation
Inventory Tracking	Manual using Excel or paper logs	Real-time, digital, automated via Salesforce
Stock Alerts	No notifications; required manual checking	Automated alerts for low stock and expirations
Approval Workflow	Paper-based or verbal approvals	System-driven with timestamped approvals
Reporting	Inconsistent and time-consuming	Auto-generated dashboards and exportable reports
Audit Trail	Not available or incomplete	Detailed activity logs with user-level tracking
Scalability	Difficult as volume grows	Easily scalable across multiple departments/locations
User Access Control	Shared access; low accountability	Role-based access with secure permissions
Data Integrity	Prone to errors	Validated and centralized data entries

7.2 SWOT Analysis

The SWOT analysis offers a strategic view of the project's internal strengths and weaknesses as well as external opportunities and threats.

☑ Strengths

- **Real-time tracking** of medical inventory across multiple departments.
- Built on **Salesforce**, ensuring high availability, security, and rapid deployment.
- Automated **email alerts**, **reporting**, and **workflow approvals** reduce manual effort.
- **Role-based access** improves accountability and audit compliance.
- Easy integration with **other hospital systems or APIs** in future.

⚠ Weaknesses

- Dependent on **Salesforce licensing and customization**, which may involve costs.
- Users unfamiliar with cloud systems may require **basic training**.
- Limited **offline support** in case of no internet availability.

🚀 Opportunities

- Can be integrated with **supplier systems** for automated reordering.
- Potential to add **predictive analytics** (e.g., demand forecasting).
- Expandable into a **full Hospital Resource Planning (HRP)** suite.

- Can integrate with **IoT** for live usage tracking (e.g., smart medicine cabinets).

⚡ Threats

- Data privacy regulations (e.g., HIPAA) may require **additional compliance measures**.
- Resistance to adoption from users accustomed to manual processes.
- Downtime in Salesforce (though rare) can temporarily **disrupt access**.
- Cybersecurity threats demand ongoing **platform-level monitoring**.

This analysis highlights that while the project offers major operational improvements and future scalability, success will also depend on user training, security awareness, and proactive adoption planning.

9.CONCLUSION :

The Salesforce Medical Inventory Management System has been successfully designed and implemented to solve key challenges in the healthcare domain related to inventory tracking, management, and optimization. By digitizing and automating critical processes such as stock monitoring, expiry alerts, and approval workflows, the system has significantly reduced manual workload and the risk of human error.

This solution leverages the power of Salesforce's secure cloud environment, built-in automation tools, and scalability to deliver a platform that is not only robust and reliable but also user-friendly for medical professionals. Through features like real-time dashboards, audit logs, and automated notifications, it ensures timely decision-making and improves patient care by maintaining the availability of essential medical supplies.

Overall, the project meets its core objectives — enhancing operational efficiency, improving compliance, and supporting better resource planning in hospitals and clinics. With room for future expansion into predictive analytics, supplier integration, and multi-site deployment, the system serves as a scalable foundation for digital transformation in healthcare inventory management.

The project successfully met its planned objectives, offering a reliable, future-proof, and efficient inventory management system that aligns with the demanding environment of modern healthcare. It also lays the groundwork for continuous innovation—such as predictive analytics, automated restocking, and IoT-based real-time tracking—which can elevate hospital supply chains to new standards of efficiency and safety.

In summary, the Salesforce Medical Inventory Management System is not just a software application but a strategic tool that improves patient outcomes, reduces costs, and empowers healthcare institutions with smarter inventory decisions.

THANK YOU