

MEDICAL INVENTORY MANAGEMENT

**COLLEGE :- SHREE VENKATESHWARA ARTS
AND SCIENCE COLLEGE
GOBICHETTIPALAYAM**

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Medical Inventory Management Project

Medical Inventory Management Project – Summary

The **Medical Inventory Management System** is designed to streamline the tracking, ordering, and management of medical products and supplies in a healthcare setup. It ensures accurate stock monitoring, efficient purchasing, and role-based access for smooth operations.

Key Objects

1 . Product

- Stores details of medical supplies (name, category, quantity, unit price, expiry date, supplier).
- Helps track available stock and low-inventory alerts.

2. Purchase Order

- Represents bulk orders placed with suppliers.
- Tracks order date, supplier, status (pending, received).

3. Order Item

- Line items linked to a purchase order.
- Includes product name, quantity, and cost.

Roles

- **Admin:** Full access (setup, roles, reports, dashboards).
- **Purchase Manager:** Creates purchase orders, approves requests, manages suppliers.

Automation (Triggers & Flows)

- **Triggers:**

- Auto-update stock levels when an order is received.
- Send alerts for low-stock or near-expiry products.

- **Flows:**
 - Approval flow for purchase orders (Staff → Manager → Admin).
 - Notification flow to managers when stock falls below threshold.
- **Reports**
 - Stock Availability Report (current inventory by product).
 - Purchase History Report (orders by date, supplier, status).
 - Expiry Report (items nearing expiry).
 - Cost Analysis Report (spend tracking on suppliers).

Dashboard

- Real-time stock summary (available vs. required).
- Pending purchase orders overview.
- Top suppliers and expenditure breakdown.
- Alerts for low stock and expiring items.

Medical Inventory Management

The screenshot shows the Salesforce Setup Home page. On the left, there's a sidebar with various setup categories like 'Setup Home', 'Salesforce Go', 'Service Setup Assistant', etc. The main area features a 'Data Cloud' card with the sub-section 'Setup'. It includes a brief description: 'Connect, prepare, harmonize, unify, and analyze data to get a 360-degree view of your customers.' Below this are buttons for 'Watch Video' and 'Let's Go'. To the right, there's another card titled 'Get Started with Einstein Bots' and a 'Mobile Publisher' card. A sidebar on the right shows the user profile 'Keerthana M' and options for 'DISPLAY DENSITY' (Comfy, Compact), 'OPTIONS' (Switch to Salesforce Classic, Add Username), and a 'Get Started' button.

Account: We had created salesforce account.(**Milestone 1- Salesforce Account**) Completed.

This screenshot shows the 'Product' object creation dialog in the Salesforce Setup Home page. The sidebar on the left lists objects like 'Setup Home', 'Salesforce Go', and 'Product'. The main area has a 'Product' card with a brief description: 'Connect, prepare, harmonize, unify, and analyze data to get a 360-degree view of your customers.' Below this are buttons for 'Watch Video' and 'Let's Go'. To the right, there's a 'Get Started with Einstein Bots' card and a 'Mobile Publisher' card. A sidebar on the right shows the user profile 'Keerthana M' and options for 'DISPLAY DENSITY' (Comfy, Compact), 'OPTIONS' (Switch to Salesforce Classic, Add Username), and a 'Get Started' button.

Objects and fields(Milestone 2- Objects)- (Milestone 5- fields)

We created the objects “*Products, Purchase Order, Order Item, Inventory Transaction and Supplier objects*”.

The screenshot shows the Salesforce Object Manager interface for the 'Product' object. The left sidebar lists various setup options like Page Layouts, Lightning Record Pages, and Field Sets. The main area is titled 'Fields & Relationships' and displays 12 items sorted by field label. The fields listed are:

Field	Label	Type
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 Name	Product__c	Text(255)
Product_ID	Name	Text(80)
Product Description	Product_Description__c	Text Area(255)
Product ID	Product_ID__c	Text(18)
Product Name	Product_Name__c	Text(255)

From “Object Manager” we created “Product object” and created its field’s and relationships Creating a Product Object completed. Created product objects fields are (“*Product ID(Standard), Product Name, Product Description, Minimum Stock Level, Current Stock Level, Unit Price, Expiry Date*”).

The screenshot shows the Salesforce Object Manager interface for the 'Purchase Order' object. The left sidebar lists various setup options. The main area is titled 'Fields & Relationships' and displays 10 items sorted by field label. The fields listed are:

Field	Label	Type
Actual Delivery Date	Actual_Delivery_Date__c	Date
Created By	CreatedBy	Lookup(User)
Expected Delivery Date	Expected_Delivery_Date__c	Date
Last Modified By	LastModifiedBy	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 ID	Name	Text(80)
Supplier ID	Supplier_ID__c	Lookup(Supplier)
Total Order Cost	Total_Order_Cost__c	Currency(16, 2)

Created **fields** for the object **Purchase Order** are *Purchase Order ID, Supplier ID, Order Date, Expected Delivery Date, Actual Delivery Date , Order count, Total Order Cost*.

SETUP > OBJECT MANAGER
Order Item

Fields & Relationships
9 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Amount	Amount_c	Currency(18, 0)		
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Order Item ID	Order_Item_ID_c	Text(255)		
Order Item ID	Name	Text(80)		✓
Product ID	Product_ID_c	Lookup(Product)		✓
Purchase Order ID	Purchase_Order_ID_c	Master-Detail(Purchase Order)		✓
Quantity Ordered	Quantity_Ordered_c	Number(18, 0)		
Quantity Received	Quantity_Received_c	Number(18, 0)		

We created object **Order Item** with required field "Order Item ID, Product ID, Purchase Order ID, Quantity Ordered, Quantity Received, Unit Price, Amount".

SETUP > OBJECT MANAGER
Inventory Transaction

Fields & Relationships
8 Items, Sorted by Field Label

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	Lookup(Purchase Order)		✓
Transaction Date	Transaction_Date_c	Date		
Transaction ID	Transaction_ID_c	Text(255)		
Transaction Type	Transaction_Type_c	Picklist		

We created object Inventory Transaction with required field “Transaction ID,Purchase Order ID,Transaction Date,Transaction Type,Total Order Cost”.

The screenshot shows the Salesforce Setup interface with the following details:

- Header: Search Setup, Home, Object Manager
- Breadcrumb: SETUP > OBJECT MANAGER
- Page Title: Supplier
- Left sidebar (Details):
 - Fields & Relationships (selected)
 - 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
- Main Content: Fields & Relationships table
| FIELD LABEL | FIELD NAME | DATA TYPE | CONTROLLING FIELD | INDEXED |
| --- | --- | --- | --- | --- |
| Address | Address_c | Text Area(255) | | |
| Contact Person | Contact_Person_c | Text(18) | | |
| Created By | CreatedBy | Lookup(User) | | |
| Email | Email_c | Email | | |
| Last Modified By | LastModifiedBy | Lookup(User) | | |
| Owner | OwnerId | Lookup(User,Group) | | |
| Phone Number | Phone_Number_c | Phone | | |
| Supplier ID | Name | Text(80) | | |
| Supplier Name | Supplier_Name_c | Text(255) | | |

We created object **Supplier** with required field “Supplier ID,Supplier Name,Contact Person,Phone Number,Email,Address”.

We had compleated object creation **Milestone2-Object** and their fields creation **Milestone5-Fields**.

Creating tabs for Object Milestone 3

We had created tabs for **Milestone 3- Tabs** Tabs are a fundamental part of the Salesforce interface, providing a way to navigate to different objects and records.

Action	Label	Tab Style	Description
Edit Del	Inventory Transactions	Factory	
Edit Del	Order Items	Pentagon	
Edit Del	products	Gears	
Edit Del	Purchase Orders	Keys	
Edit Del	Suppliers	Leaf	

We have created tabs for objects “*Product, Purchase Order, Order Item, Inventory Transaction, Supplier*”.

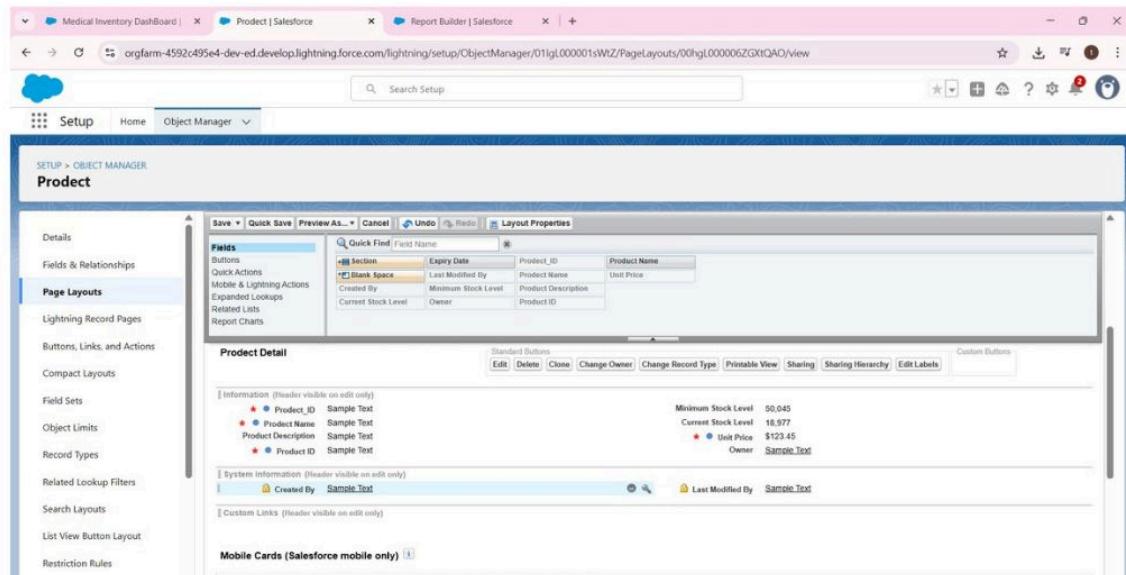
Lightning App for Medical Inventory Management Milestone 4

App Name ↑	Developer Name	Description	Last Modified ...	Type	Vi...
1 Data Cloud	Audience360	Build a thorough and complete understanding of your customers.	6/26/2025, 10:15 A...	Lightning	✓
10 Data Manager	DataManager	Use Data Manager to view limits, monitor usage, and manage recipes.	6/26/2025, 10:15 A...	Lightning	✓
11 Digital Experiences	SalesforceCMS	Manage content and media for all of your sites.	6/26/2025, 10:15 A...	Lightning	✓
12 Lightning Usage App	LightningInstrumentation	View Adoption and Usage Metrics for Lightning Experience	6/26/2025, 10:15 A...	Lightning	✓
13 Marketing CRM Classic	Marketing	Track sales and marketing efforts with CRM objects.	6/26/2025, 10:15 A...	Classic	✓
14 Medical Inventory Management	Medical_Inventory_Manageme...	Medical Inventory Management	8/31/2025, 1:18 AM	Lightning	✓
15 My Service Journey	MSIApp	Discover new customer service capabilities.	6/26/2025, 10:15 A...	Lightning	✓
16 Platform	Platform	The fundamental Lightning Platform	6/26/2025, 10:15 A...	Classic	✓
17 Queue Management	QueueManagement	Create and manage queues for your business.	6/26/2025, 10:15 A...	Lightning	✓
18 Sales	Sales	The world's most popular sales force automation (SFA) solution	6/26/2025, 10:15 A...	Classic	✓
19 Sales	LightningSales	Manage your sales process with accounts, leads, opportunities, and more	6/26/2025, 10:15 A...	Lightning	✓
20 Sales Cloud Mobile	SalesCloudMobile	New seller focused mobile first experience	6/26/2025, 10:15 A...	Lightning	✓
21 Sales Console	LightningSalesConsole	(Lightning Experience) Lets sales reps work with multiple records on one scre...	6/26/2025, 10:15 A...	Lightning	✓

We had created Lightning App for Medical Inventory Management with Available Items, selected “Products, Purchase Orders, Order Items, Inventory Transactions, Suppliers, Reports, and Dashboard”. And also from Available Profiles we select System Administrator and move it to Selected Profiles.

We had compleated **Milestone 4**

Editing of Page Layouts-Milestone 6



We had edited Page Layout in Product Object.

Same like as we edited page layouts for object Purchase Order, Purchase Order, Inventory Transaction, Supplier.
We had compleated **Milestone 6**

We had edited Page Layout in Purchase order Object.

The screenshot shows the Salesforce Setup interface for the Purchase Order object. The left sidebar lists various configuration options like Details, Fields & Relationships, Page Layouts, and Lightning Record Pages. The 'Page Layouts' section is selected. The main area displays the 'Purchase Order Detail' page layout. It includes a 'Fields' section with a 'Quick Find' search bar, a 'Purchase Order Detail' section with standard buttons (Edit, Delete, Clone, Change Owner, Change Record Type, Printable View, Sharing, Sharing Hierarchy, Edit Labels), and a 'Custom Buttons' section. The 'Purchase Order Detail' section contains fields for Purchase Order ID, Supplier ID, Order Date, Expected Delivery Date, Order Count, Actual Delivery Date, Order Item ID, Order Item ID, Quantity Ordered, and Quantity Received.

We had edited Page Layout in Order items Object.

The screenshot shows the Salesforce Setup interface for the Order Item object. The left sidebar lists various configuration options like Details, Fields & Relationships, Page Layouts, and Lightning Record Pages. The 'Page Layouts' section is selected. The main area displays the 'Order Item Detail' page layout. It includes a 'Fields' section with a 'Quick Find' search bar, a 'Order Item Detail' section with standard buttons (Edit, Delete, Clone, Change Owner, Change Record Type, Printable View, Edit Labels), and a 'Custom Buttons' section. The 'Order Item Detail' section contains fields for Order Item ID, Order Item ID, Product ID, Amount, Purchase Order ID, Order Item ID, Quantity Ordered, and Quantity Received.

We had edited Page Layout in Inventory Transaction Object.

The screenshot shows the Salesforce Setup interface for the 'Inventory Transaction' object. The left sidebar is titled 'Object Manager' and lists various configuration options like Details, Fields & Relationships, Page Layouts, Lightning Record Pages, etc. The 'Page Layouts' option is selected. The main area displays the 'Inventory Transaction Detail' page layout. At the top, there's a toolbar with Save, Quick Save, Preview As..., Cancel, Undo, Redo, and Layout Properties buttons. Below the toolbar is a 'Fields' section with a 'Quick Find' field name search bar. A 'Salesforce Mobile and Lightning Experience Actions' section follows, containing a message about overriding predefined actions. The main content area is titled 'Inventory Transaction Detail' and contains sections for 'Information' and 'System Information'. The 'Information' section includes fields for Inventory Transaction ID, Transaction Type, Transaction ID, Purchase Order ID, and Transaction Date. The 'System Information' section includes Created By, Last Modified By, and Owner. Standard buttons like Edit, Delete, Clone, Change Owner, Change Record Type, Printable View, Sharing, Sharing Hierarchy, and Edit Labels are located at the bottom of the detail section.

We had edited Page Layout in Supplier Object.

The screenshot shows the Salesforce Setup interface for the 'Supplier' object. The left sidebar is titled 'Object Manager' and lists various configuration options like Details, Fields & Relationships, Page Layouts, Lightning Record Pages, etc. The 'Page Layouts' option is selected. The main area displays the 'Supplier Detail' page layout. At the top, there's a toolbar with Save, Quick Save, Preview As..., Cancel, Undo, Redo, and Layout Properties buttons. Below the toolbar is a 'Fields' section with a 'Quick Find' field name search bar. The main content area is titled 'Supplier Detail' and contains sections for 'Information', 'System Information', and 'Mobile Cards (Salesforce mobile only)'. The 'Information' section includes fields for Supplier ID, Supplier Name, and Contact Person. The 'System Information' section includes Created By, Last Modified By, and Owner. The 'Mobile Cards' section has a note: 'Drag expanded lookups and mobile-enabled Visualforce pages here to display them as mobile cards.' Standard buttons like Edit, Delete, Clone, Change Owner, Change Record Type, Printable View, Sharing, Sharing Hierarchy, and Edit Labels are located at the bottom of the detail section.

Compact Layouts-Milestone 7

Created a Compact Layout to a Product Object

The screenshot shows the Salesforce Setup interface for creating a compact layout for the 'Product' object. The left sidebar navigation includes 'Details', 'Fields & Relationships', 'Page Layouts', 'Lightning Record Pages', 'Buttons, Links, and Actions', 'Compact Layouts' (which is selected), 'Field Sets', 'Object Limits', 'Record Types', 'Related Lookup Filters', and 'Search Layouts'. The main content area displays the 'Product Compact Layout' detail page. It shows the layout's label ('Product Compact Layout'), API name ('Product_Compact_Layout'), and included fields ('Product Name', 'Unit Price', 'Current Stock Level'). The 'Compact Layout Assignment' section indicates the object name is 'Product'. The layout was created by Thanusuya S.R. on 8/31/2025, 4:47 AM, and modified by Thanusuya S.R. on 8/31/2025, 4:47 AM.

Selected the Compact Layout Fields as Product name, Unit Price, Current Stock Level.

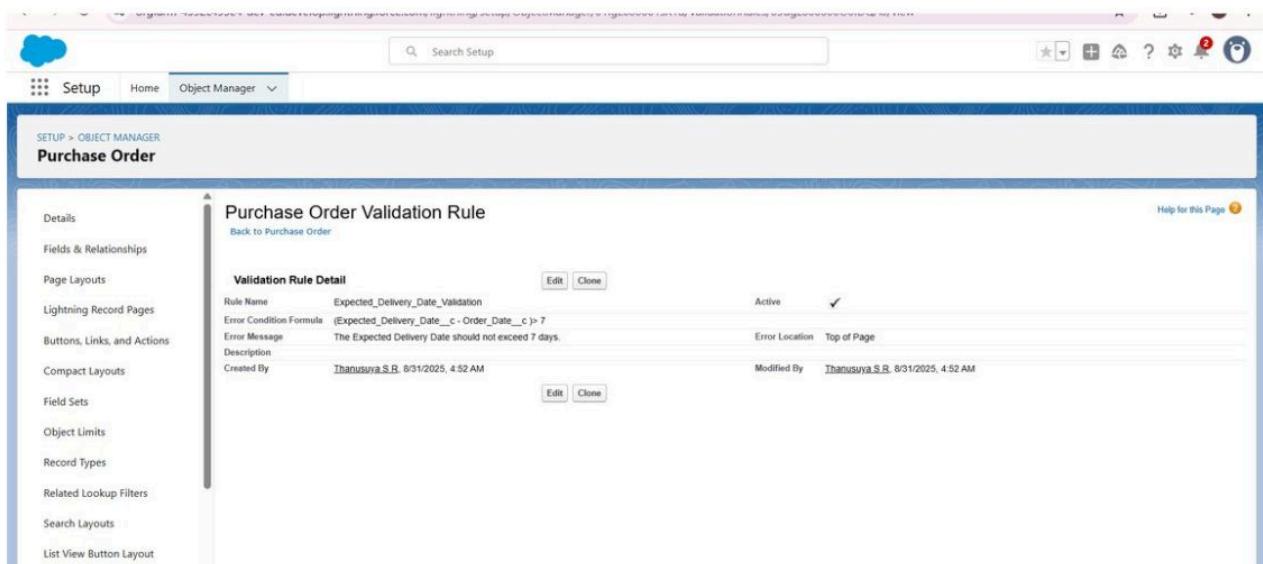
Created a Compact Layout to a Purchase Order Object

The screenshot shows the Salesforce Setup interface for creating a compact layout for the 'Purchase Order' object. The left sidebar navigation includes 'Details', 'Fields & Relationships', 'Page Layouts', 'Lightning Record Pages', 'Buttons, Links, and Actions', 'Compact Layouts' (which is selected), 'Field Sets', 'Object Limits', 'Record Types', 'Related Lookup Filters', 'Search Layouts', 'List View Button Layout', 'Restriction Rules', and 'Scoping Rules'. The main content area displays the 'Purchase Order Compact Layout' detail page. It shows the layout's label ('Purchase Order Compact Layout'), API name ('Purchase_Order_Compact_Layout'), and included fields ('Purchase Order ID', 'Order Date', 'Total Order Cost', 'Supplier ID'). The 'Compact Layout Assignment' section indicates the object name is 'Purchase Order'. The layout was created by Thanusuya S.R. on 8/31/2025, 4:50 AM, and modified by Thanusuya S.R. on 8/31/2025, 4:50 AM.

Selected the Compact Layout Fields as Purchase Order ID, Order Date, Total Order Cost, Supplier ID.

Validation Rules-Milestone 8

Validation rules in Salesforce are used to ensure data integrity by preventing users from saving invalid data in records.
Created an Expected Delivery Date Validation rule to a Employee Object



Inserted the Error Condition Formula as :
(Expected_Delivery_Date__c - Order_Date__c)> 7

The Error Message as “The Expected Delivery Date should not exceed 7 days.”.

Selected the Error location as Top of Page.

Compleated Milestone 8

Profiles Milestone-9

Profiles control a user's permissions to objects, fields, tabs, apps, and other settings.

Created an Inventory Manager Profile

The screenshot shows the Salesforce Setup interface with the 'Profiles' tab selected in the left sidebar under 'Users'. The main area displays the 'Inventory Manager' profile details. The profile name is 'Inventory Manager', user license is 'Salesforce', and it was created by 'Thanusuya S.B.' on '8/31/2025, 4:55 AM'. The 'Modified By' field shows 'Thanusuya S.B.' modified on '9/1/2025, 7:27 AM'. The 'Profile Detail' section includes links for 'Edit', 'Clone', 'Delete', and 'View Users'. Below this, the 'Page Layouts' section lists various standard object layouts like Global Layout, Home Page Layout, Account Layout, and Alternative Payment Method Layout, each with their respective assignment details. A note at the top states: 'Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information. If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.' A help link 'Help for this Page' is also present.

We had created **Inventory Manager Profile** ,Selected the Custom App settings as default for the Medical Inventory Management.

The screenshot shows the 'Custom App Settings' section within the 'Profiles' setup page. It lists various standard and custom applications along with their visibility and default status. Applications include All Tabs, Analytics Studio, App Launcher, Approvals, Automation, Bolt Solutions, Community, Content, Data Cloud, Data Manager, Digital Experiences, Lightning Usage App, Marketing CRM Classic, Medical Inventory Management, My Service Journey, Queue Management, Sales, Sales Cloud Mobile, Sales Console, Service Chatter, Salesforce Scheduler Setup, Sample Console, Service, Service Console, Site.com, Subscription Management, Travel App, and WDC. The 'Visible' column contains checkboxes, and the 'Default' column contains checkboxes. The 'Inventory Manager' profile has checked boxes for most of these applications, indicating they are set as defaults for this profile.

Custom Object Permissions

Object	Basic Access				Data Administration			Basic Access				Data Administration		
	Read	Create	Edit	Delete	View All Records	Modify All Records	View All Fields	Read	Create	Edit	Delete	View All Records	Modify All Records	View All Fields
Inventory Transactions	✓	✓	✓	✓	✓	✓	✓							
Order Items	✓	✓	✓	✓	✓	✓	✓							
Products	✓	✓	✓	✓	✓	✓	✓							

Session Settings

Setting	Value
Session Times Out After	2 hours of inactivity
Session Security Level Required at Login	

Password Policies

Requirement	Setting
User passwords expire in	Never expires
Enforce password history	3 passwords remembered
Minimum password length	8
Password complexity requirement	Must include alpha and numeric characters
Password question requirement	Cannot contain password
Maximum invalid login attempts	10
Lockout effective period	15 minutes
Obfuscate secret answer for password resets	<input type="checkbox"/>
Require a minimum 1 day password lifetime	<input type="checkbox"/>

1. User passwords expire in should be “ never expires ”.
2. Minimum password length should be “ 8 ”.

Created an Purchase Manager Profile

Profile Detail

Name	Purchase Manager	Custom Profile
User License	Salesforce	<input checked="" type="checkbox"/>
Description		
Created By	Thanusuya S.R. 8/31/2025, 4:59 AM	Modified By Thanusuya S.R. 9/1/2025, 7:27 AM

Page Layouts

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

The screenshot shows the Salesforce Setup interface under the 'Profiles' tab. The 'Custom App Settings' section is displayed, listing various apps with checkboxes for 'Visible' and 'Default'. The 'Medical Inventory Management (Medical_Inventory_Management)' app has its 'Default' checkbox checked.

App	Visible	Default
All Tabs (standard__AllTabSet)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Analytics Studio (standard__Insights)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
App Launcher (standard__AppLauncher)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Approvals (standard__Approvals)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Automation (standard__FlowsApp)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Bolt Solutions (standard__LightningBolt)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Community (standard__Community)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Content (standard__Content)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Data Cloud (standard__Audience360)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Data Manager (standard__DataManager)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Digital Experiences (standard__SalesforceCMS)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Employee Usage App (standard__LightningInstrumentation)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Marketing CRM Classic (standard__Marketing)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Medical Inventory Management (Medical_Inventory_Management)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
My Service Journey (standard__MS_Journey)	<input type="checkbox"/>	<input type="checkbox"/>
Queue Management (standard__QueueManagement)	<input type="checkbox"/>	<input type="checkbox"/>
Sales (standard__Sales)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Sales Cloud Mobile (standard__SalesCloudMobile)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Sales Console (standard__Lightning_SalesConsole)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Salesforce Chatter (standard__Chatter)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Salesforce Scheduler Setup (standard__LightningScheduler)	<input type="checkbox"/>	<input type="checkbox"/>
Sample Console (standard__ServiceConsole)	<input type="checkbox"/>	<input type="checkbox"/>
Service (standard__Service)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Service Console (standard__LightningService)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Site.com (standard__Sites)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Subscription Management (standard__RevenueCloudConsole)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Travel App (Travel_App)	<input type="checkbox"/>	<input type="checkbox"/>
WDC (standard__Work)	<input checked="" type="checkbox"/>	<input type="checkbox"/>

We had created **Purchase Manager Profile** ,Selected the Custom App settings as default for the Medical Inventory Management.

The screenshot shows the Salesforce Setup interface under the 'Profiles' tab. The 'Custom Object Permissions' section is displayed, showing permissions for 'Inventory Transactions', 'Order Items', 'Products', 'Purchase Orders', and 'Suppliers'. The 'Session Settings' section shows 'Session Times Out After' set to '2 hours of inactivity' and 'Session Security Level Required at Login' set to 'Standard'. The 'Password Policies' section shows various password requirements like 'User passwords expire in' (Never expires), 'Enforce password history' (3 passwords remembered), and 'Minimum password length' (8).

Object	Basic Access				Data Administration			Basic Access				Data Administration		
	Read	Create	Edit	Delete	View All Records	Modify All Records	View All Fields	Read	Create	Edit	Delete	View All Records	Modify All Records	View All Fields
Inventory Transactions	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>					
Order Items	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Products	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Purchase Orders	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Suppliers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

1. User passwords expire in should be “ never expires ”.
2. Minimum password length should be “ 8 ”.

Roles-Milestone 10

Roles in Salesforce are used to control record-level access and define the hierarchy of an organization, determining the level of visibility and sharing of records among users.

Create a Purchasing Manager Role.

The screenshot shows the Salesforce Setup interface with the 'Users' section selected. Under 'Roles', a new role named 'Purchasing Manager' is being created. The 'Role Detail' table includes the following information:

Label	Purchasing Manager	Role Name	Purchasing_Manager
This role reports to	SVP_Sales & Marketing	Role Name as displayed on reports	
Modified By	Thanusuya S.R. 8/31/2025, 5:06 AM	Sharing Groups	Role, Role and Internal Subordinates
Opportunity Access	Users in this role can edit all opportunities associated with accounts that they own, regardless of who owns the opportunities		
Case Access	Users in this role can edit all cases associated with accounts that they own, regardless of who owns the cases		

The 'Users in Purchasing Manager Role' section below shows no records displayed.

The screenshot shows the Salesforce Setup interface with the 'Users' section selected. Under 'Roles', a new role named 'Inventory Manager' is being created. The 'Role Detail' table includes the following information:

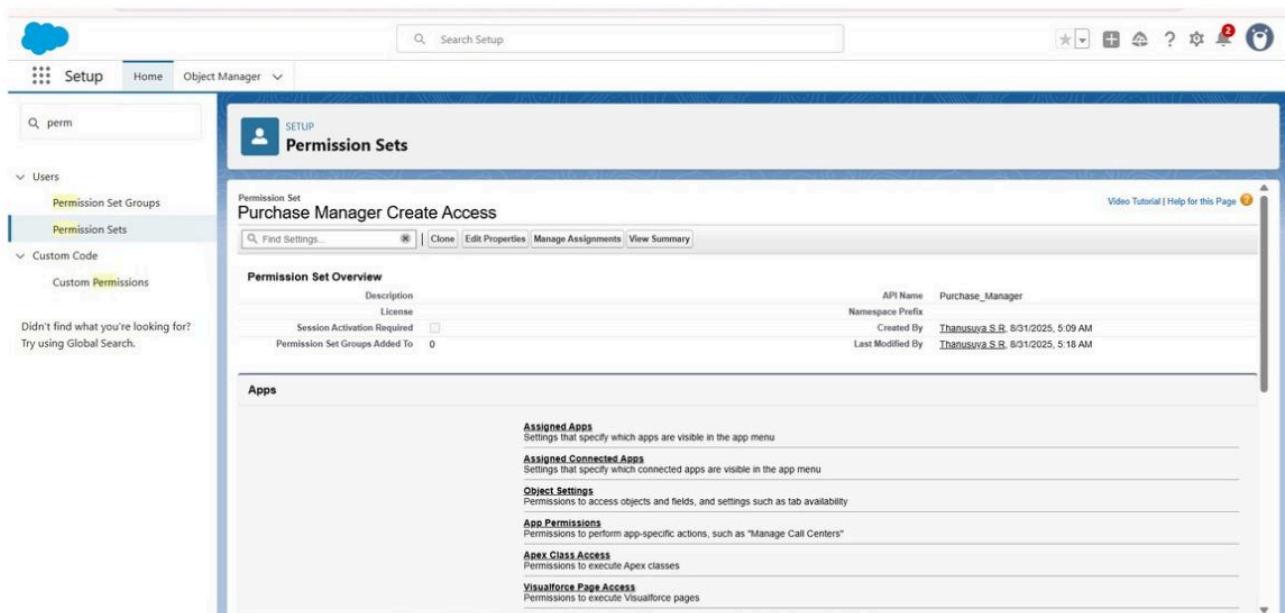
Label	Inventory Manager	Role Name	Inventory_Manager
This role reports to	SVP_Sales & Marketing	Role Name as displayed on reports	
Modified By	Thanusuya S.R. 8/31/2025, 5:07 AM	Sharing Groups	Role, Role and Internal Subordinates
Opportunity Access	Users in this role can edit all opportunities associated with accounts that they own, regardless of who owns the opportunities		
Case Access	Users in this role can edit all cases associated with accounts that they own, regardless of who owns the cases		

The 'Users in Inventory Manager Role' section below shows no records displayed.

Create a Inventory Manager Role

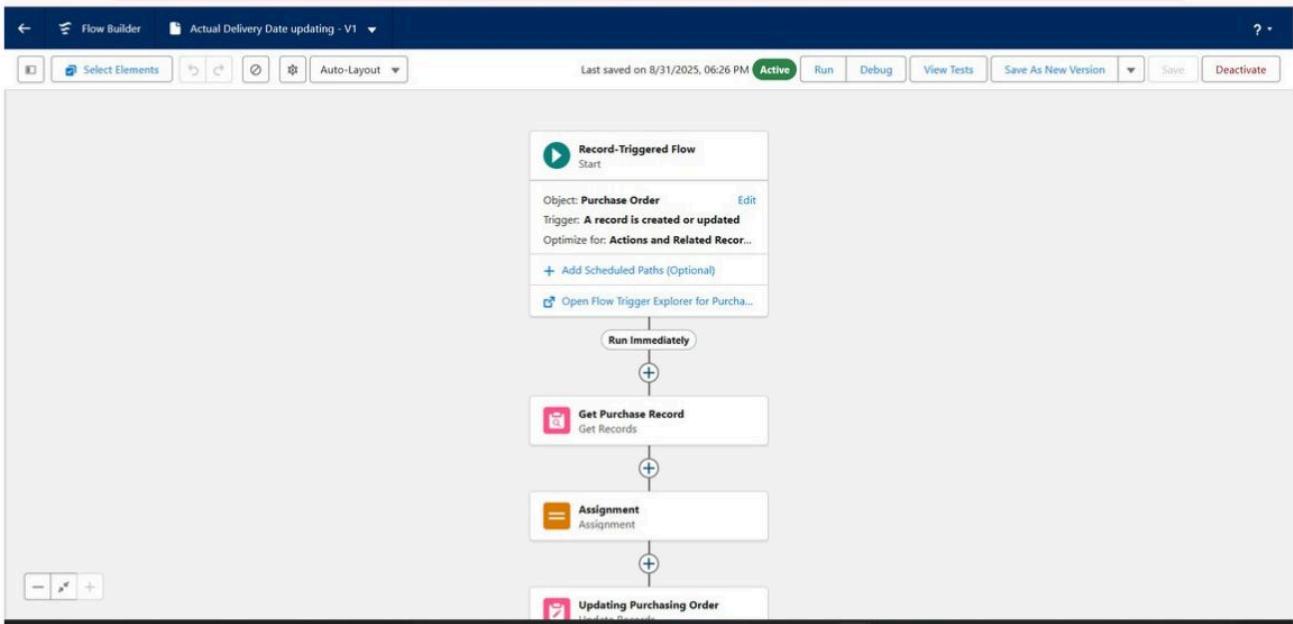
Permission Sets Milestone-12

Permission Sets in Salesforce are a powerful tool to extend user permissions beyond what is defined in their profiles. They allow administrators to grant additional access to various tools and functions without altering the user's profile. Permission sets are particularly useful for providing specialized permissions to specific users without the need to create multiple profiles.



Flows Milestone-13

Flows part of the Lightning Flow product, are powerful automation tools that help you collect data and perform actions in your Salesforce environment. Flows can be used to automate business processes, guide users through tasks, and integrate with external systems. They are highly versatile and can be configured to meet a wide range of business requirements without the need for custom code.



Triggers Milestone-14

Triggers in Salesforce are pieces of Apex code that execute before or after specific data manipulation events on Salesforce records, such as insertions, updates, deletions, and undeletions.

Apex Trigger: This will open a new Apex Trigger editor tab.

```

trigger CalculateTotalAmountTrigger on Order_Item__c (after insert, after update, after delete, after undelete) {
    // Call the handler class to handle the logic
    CalculateTotalAmountHandler.calculateTotal(Trigger.new, Trigger.old, Trigger.isInsert, Trigger.isUpdate, Trigger.isDelete, Trigger.isUndelete);
}

```

The screenshot shows the Salesforce Apex Trigger editor with the following details:

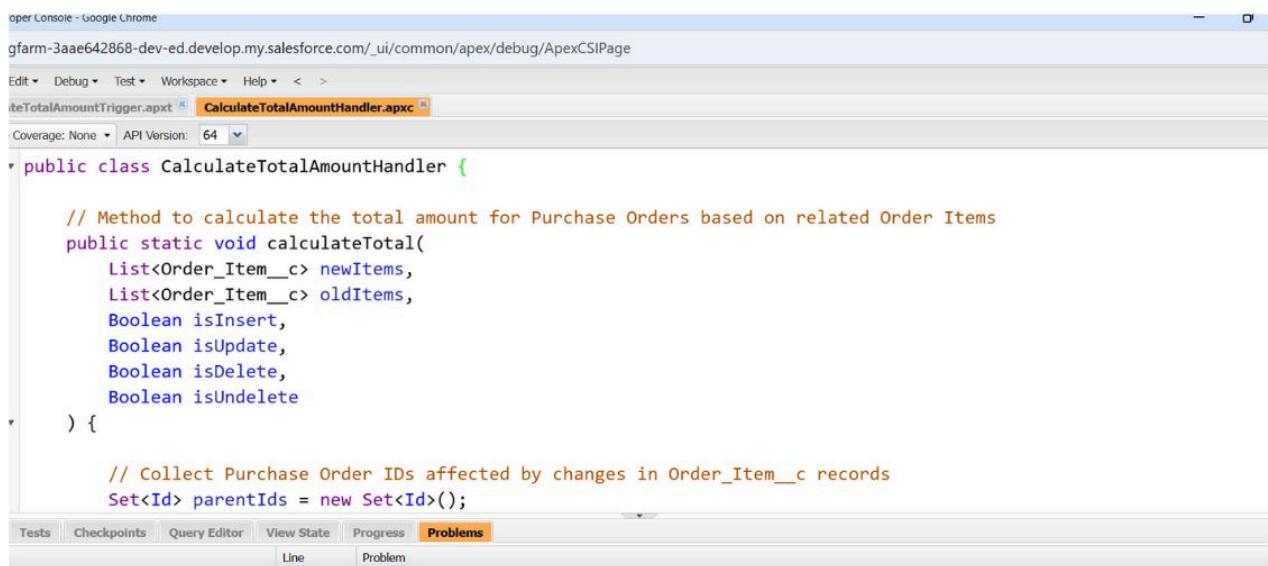
- File:** CalculateTotalAmountTrigger.apxt
- Code Coverage:** None
- API Version:** 64
- Code:**

```

trigger CalculateTotalAmountTrigger on Order_Item__c (after insert, after update, after delete, after undelete) {
    // Call the handler class to handle the logic
    CalculateTotalAmountHandler.calculateTotal(Trigger.new, Trigger.old, Trigger.isInsert, Trigger.isUpdate, Trigger.isDelete, Trigger.isUndelete);
}

```
- Logs, Tests, Checkpoints, Query Editor, View State, Progress, Problems:** Tabs at the bottom of the editor.

Apex Class: Name it as CalculateTotalAmountHandler



The screenshot shows the Salesforce Apex code editor interface. The title bar reads "open Console - Google Chrome" and "gfarm-3aae642868-dev-ed.develop.my.salesforce.com/_ui/common/apex/debug/ApexCSIPage". The menu bar includes "Edit", "Debug", "Test", "Workspace", "Help", and "File". The toolbar shows "Coverage: None" and "API Version: 64". The main code area contains the following Apex class:

```
public class CalculateTotalAmountHandler {

    // Method to calculate the total amount for Purchase Orders based on related Order Items
    public static void calculateTotal(
        List<Order_Item__c> newItems,
        List<Order_Item__c> oldItems,
        Boolean isInsert,
        Boolean isUpdate,
        Boolean isDelete,
        Boolean isUndelete
    ) {
        // Collect Purchase Order IDs affected by changes in Order_Item__c records
        Set<Id> parentIds = new Set<Id>();
    }
}
```

The code editor has tabs for "Tests", "Checkpoints", "Query Editor", "View State", "Progress", and "Problems". The "Problems" tab is selected, showing "Line" and "Problem" sub-options.

Completed **Milestone-14.**

Reports Milestone-15

They allow users to create, customize, and share different types of reports based on data from standard and custom objects. Reports help organizations make informed decisions by providing insights into key metrics, trends, and performance indicators.

Created a Purchase Orders based on Suppliers(Summary) Report

Customized our report, in group rows select – Supplier ID, Purchase Order: Purchase Order ID, for columns Order Count, Total Order Cost (In this way we are making a Summary Report).

Report: Purchase Orders
Purchase Orders based on Suppliers.

Total Records: 3 Total Total Order Cost: \$39,500.00

Supplier	Purchase Order: Purchase Order ID	Order Date	Total Order Cost
s002 (1)	pc002 (1)	9/4/2025	\$7,500.00
	Subtotal		\$7,500.00
Subtotal			\$7,500.00
s001 (2)	pc (1)	9/1/2025	\$12,000.00
	Subtotal		\$12,000.00
	pc003 (1)	9/9/2025	\$20,000.00
	Subtotal		\$20,000.00
Subtotal			\$32,000.00
Total (3)			\$39,500.00

The above is report based on Medical inventory management

Report: Purchase Orders
Purchase Orders with Order Items and Pro

Supplier	Actual Delivery Date	Purchase Order: Purchase Order ID	Purchase Order: ID	Order Count	Purchase Order: Owner Name
s001 (2)	9/12/2025 (1)	pc003 (1)	a0AgK000001cSfR	4	Keerthana M
	Subtotal			4	
				4	
	9/4/2025 (1)	pc (1)	a0AgK000001cSSX	3	Keerthana M
	Subtotal			3	
				3	
Subtotal				7	
s002 (1)	9/7/2025 (1)	pc002 (1)	a0AgK000001cSab	2	Keerthana M
	Subtotal			2	
				2	
Subtotal				2	
Total (3)				9	

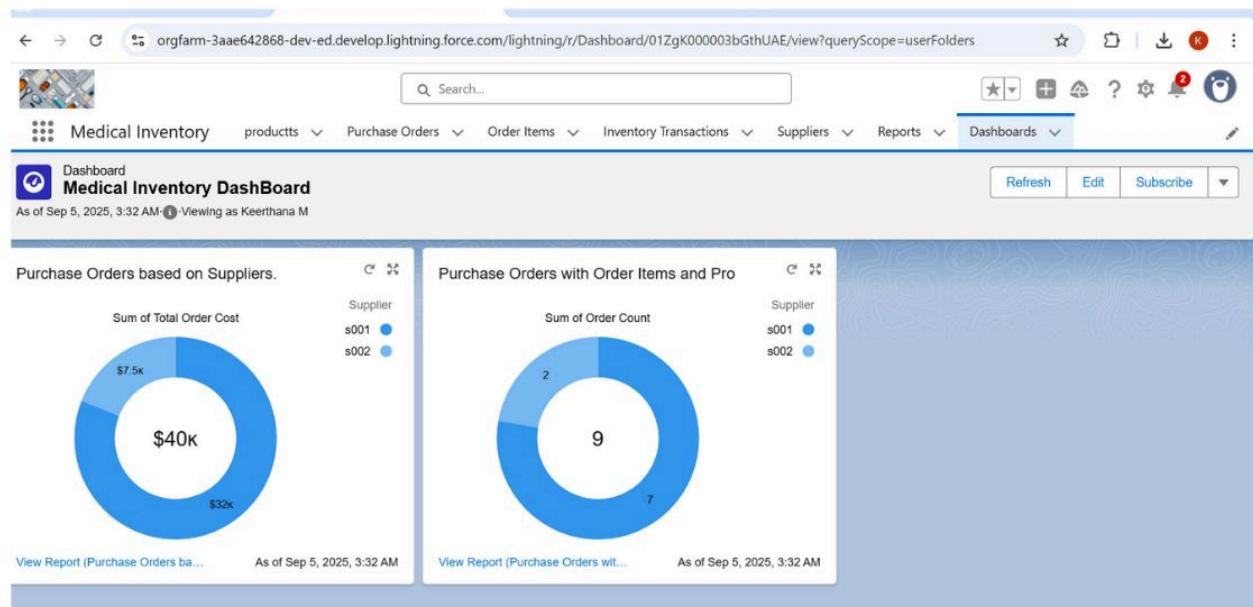
The above is report based on Medical inventory management named as Complete Purchase Details Report.

Customized our report, in group rows select – Supplier ID, Actual Delivery Date, Purchase Order: Purchase Order ID, for columns Product ID : Product ID, Product ID : Product Name, Order Count, Quantity Received, Amount (In this way we are making a Summary Report).

Dashboards Milestone -16

Dashboards in Salesforce are dynamic visual representations of key metrics and data from reports, providing a consolidated view of organizational performance and trends. They are powerful tools for monitoring real-time data, tracking progress towards goals, and gaining actionable insights at a glance. Dashboards consist of components such as charts, tables, metrics, and gauges that display data from underlying reports

Created Dashboard



The above dashboard details is get from **Medical inventory management** .

THANK YOU

This project is compleated by
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NANDHINI S, GOKULA PRIYA M**