

MEDICAL INVENTORY MANAGEMENT

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Medical Inventory Management

User Story:

The Medical Inventory Management System is a comprehensive Salesforce application designed to streamline and manage various operational aspects of the medical inventory. It can efficiently maintain supplier details, manage purchase orders, track product details and transactions, and monitor expiry dates of products, thereby improving operational efficiency, data accuracy, and reporting capabilities.

Project Overview :

This project is a comprehensive Salesforce application to streamline and manage various operational aspects of medical inventory. The system aims to efficiently maintain supplier details, manage purchase orders, track product details and transactions, and monitor the expiry dates of products. Maintain detailed records of suppliers, including contact information. Catalog product information, including descriptions, stock levels. Monitor and track product expiry dates to avoid using expired items. Comprehensive reports to track supplier performance, and purchase orders.

Medical Inventory Management

User Story:

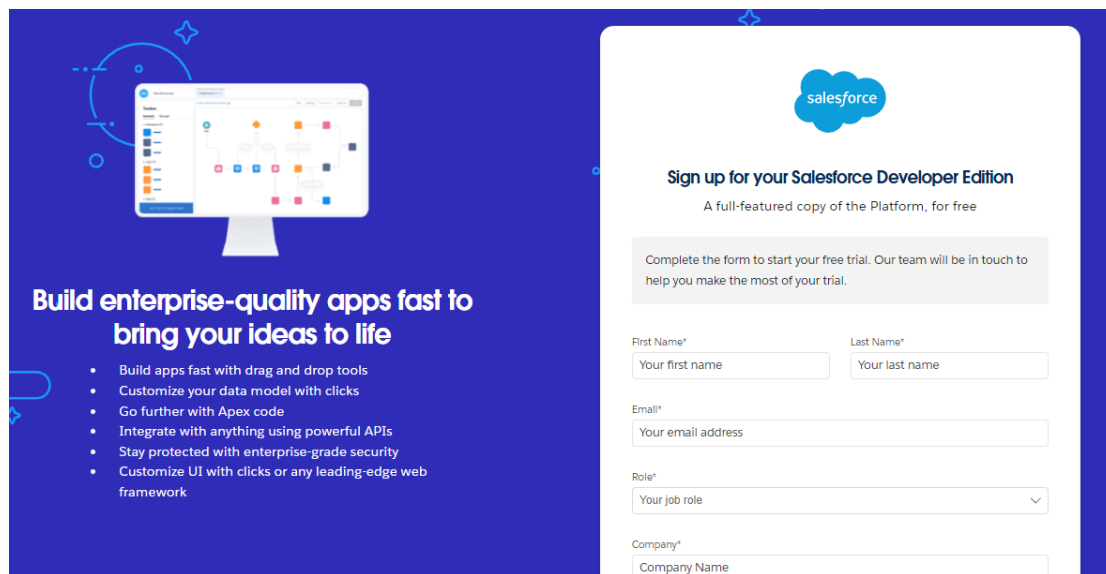
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Creating Developer Account



The image shows a sign-up form for Salesforce Developer Edition. On the left, there is a blue background with a white monitor displaying a flowchart. The text 'Build enterprise-quality apps fast to bring your ideas to life' is prominently displayed. Below this, a list of features is provided. On the right, the Salesforce logo is at the top, followed by the heading 'Sign up for your Salesforce Developer Edition' and a subtext 'A full-featured copy of the Platform, for free'. A grey box contains the instruction: 'Complete the form to start your free trial. Our team will be in touch to help you make the most of your trial.' The form fields include: 'First Name*' (text input), 'Last Name*' (text input), 'Email*' (text input), 'Role*' (dropdown menu with 'Your job role' selected), and 'Company*' (text input with 'Company Name' as a placeholder).

Build enterprise-quality apps fast to bring your ideas to life

- Build apps fast with drag and drop tools
- Customize your data model with clicks
- Go further with Apex code
- Integrate with anything using powerful APIs
- Stay protected with enterprise-grade security
- Customize UI with clicks or any leading-edge web framework

Sign up for your Salesforce Developer Edition
A full-featured copy of the Platform, for free

Complete the form to start your free trial. Our team will be in touch to help you make the most of your trial.

First Name*
Your first name

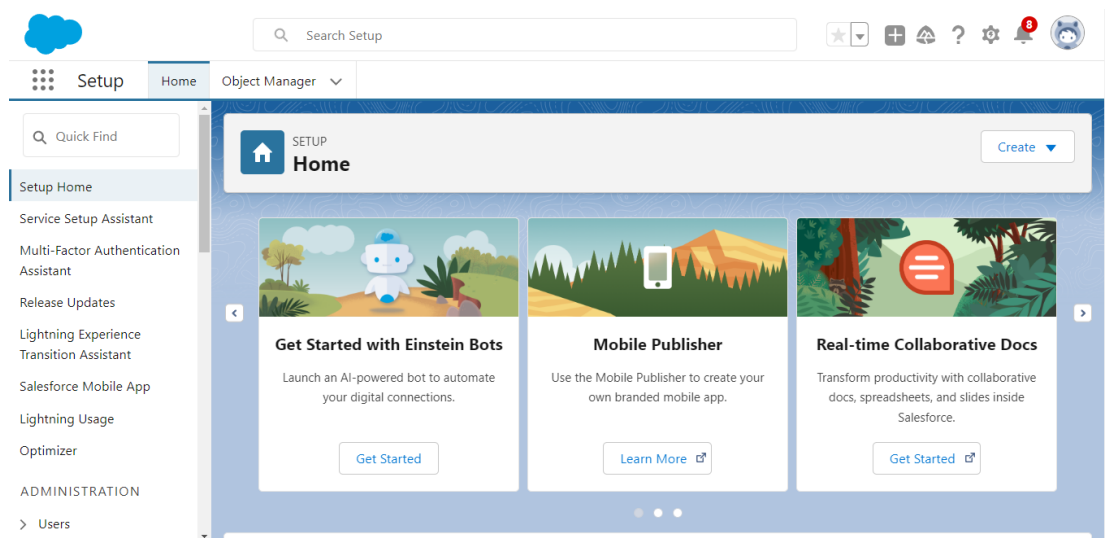
Last Name*
Your last name

Email*
Your email address

Role*
Your job role

Company*
Company Name

Account Activation



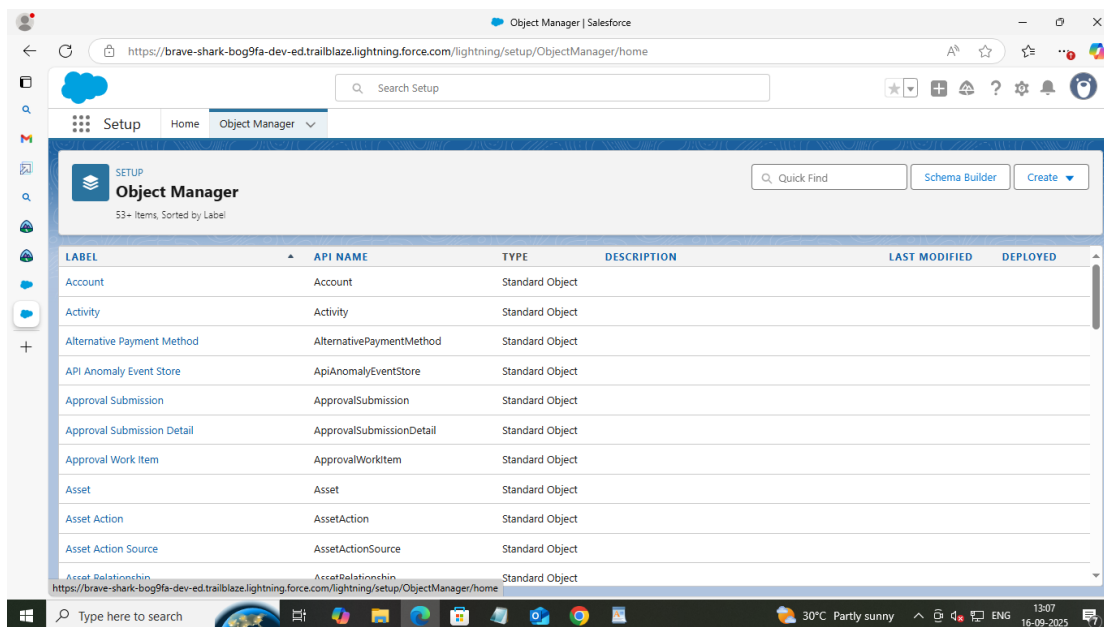
The image shows the Salesforce Setup Home dashboard. At the top, there is a blue header with the Salesforce logo, a search bar labeled 'Search Setup', and several utility icons (star, plus, cloud, question mark, gear, bell with 8 notifications, and a user profile). Below the header, the 'Setup' tab is selected, showing a navigation menu on the left with options like 'Setup Home', 'Service Setup Assistant', 'Multi-Factor Authentication Assistant', 'Release Updates', 'Lightning Experience Transition Assistant', 'Salesforce Mobile App', 'Lightning Usage', 'Optimizer', and 'ADMINISTRATION' (with a sub-item 'Users'). The main content area is titled 'SETUP Home' and features three large cards: 'Get Started with Einstein Bots' (with a 'Get Started' button), 'Mobile Publisher' (with a 'Learn More' button), and 'Real-time Collaborative Docs' (with a 'Get Started' button). Each card includes a brief description of the feature.

SETUP Home [Create](#)

Get Started with Einstein Bots
Launch an AI-powered bot to automate your digital connections.
[Get Started](#)

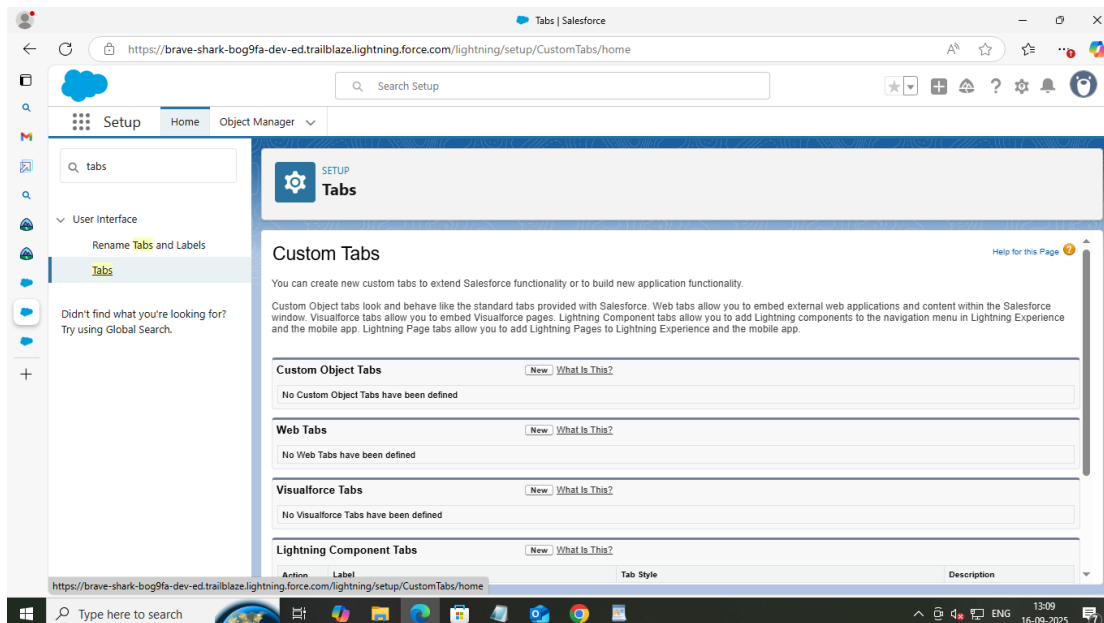
Mobile Publisher
Use the Mobile Publisher to create your own branded mobile app.
[Learn More](#)

Real-time Collaborative Docs
Transform productivity with collaborative docs, spreadsheets, and slides inside Salesforce.
[Get Started](#)



Tabs

Creating a tab for Product Object



Creating Remaining Tabs

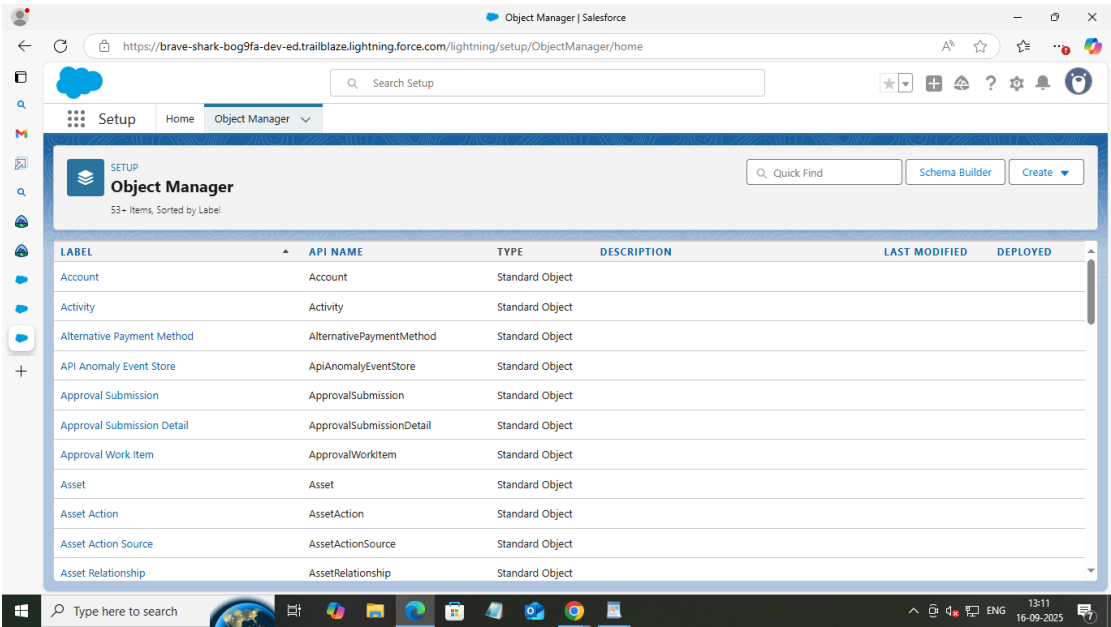
The Lightning App

A Lightning App in Salesforce is a collection of items that work together to serve a particular function for the end-users. These items can include standard and custom objects, tabs, utilities, and other productivity

tools. Lightning Apps are designed to provide a more intuitive and efficient user experience compared to traditional Salesforce apps.

Create a Lightning App for Medical Inventory ManagementFields

Creating a Text Field in Product Object

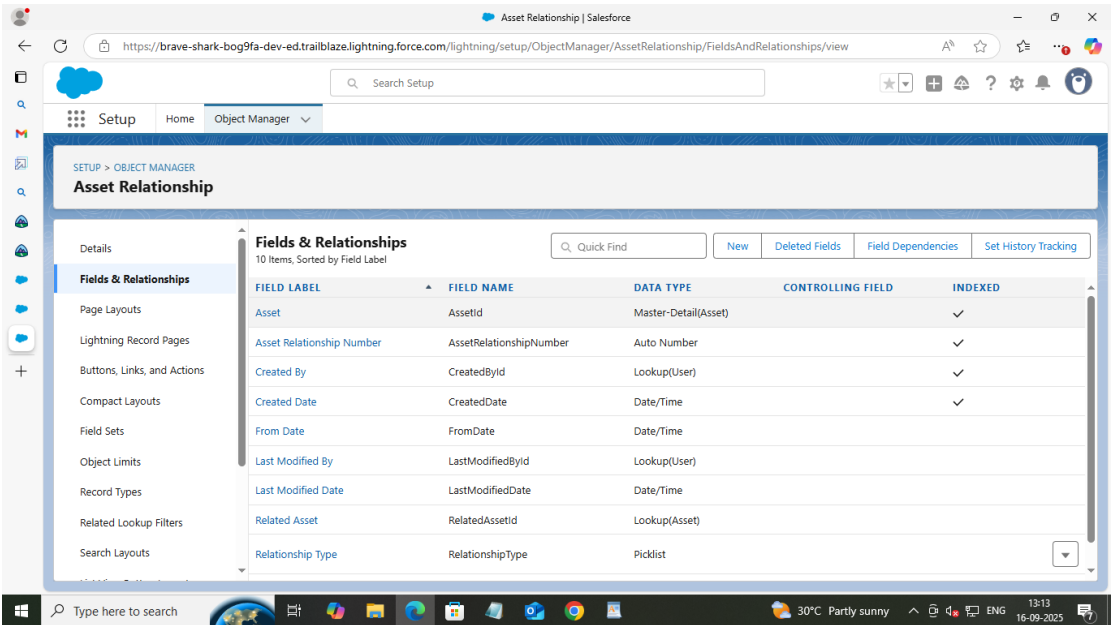


Creating a TextArea Field in Product Object

Creating a Number Field in Product object

Creating a Number Field in Product object

Creating Lookup Relationship in Purchase Order Object



Creating a Date Field in Purchase Order object

Step 2. Enter the details Step 2 of 4

Previous **Next** Cancel

Field Label 5

Field Name 6

Description

Help Text

Required ☐ Always require a value in this field in order to save a record

Auto add to custom report type ☒ Add this field to existing custom report types that contain this entity

Default Value [Show Formula Editor](#)

Use formula syntax. Enclose text and picklist value API names in double quotes ("the_text"). Include numbers without quotes (25). Show percentages as decimals (0.10), and express date calculations in the standard format: (Today() + 7). To reference a field from a Custom Metadata type record use: \$CustomMetadata.Type__mdt.RecordAPIName.Field__c

Creating a Roll-Up Summary Field in Purchase Order object

Asset Relationship | Salesforce

https://brave-shark-bog9fa-dev-ed.trailblaze.lightning.force.com/lightning/setup/ObjectManager/AssetRelationship/FieldsAndRelationships/view

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER

Asset Relationship

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

Fields & Relationships
10 Items, Sorted by Field Label

Quick Find New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Asset	AssetId	Master-Detail(Asset)		✓
Asset Relationship Number	AssetRelationshipNumber	Auto Number		✓
Created By	CreatedById	Lookup(User)		✓
Created Date	CreatedDate	Date/Time		✓
From Date	FromDate	Date/Time		
Last Modified By	LastModifiedById	Lookup(User)		
Last Modified Date	LastModifiedDate	Date/Time		
Related Asset	RelatedAssetId	Lookup(Asset)		
Relationship Type	RelationshipType	Picklist		

Type here to search

13:15 16-09-2025

Editing of Page Layouts

Page layouts in Salesforce are used to customize the organization, structure, and content of pages for viewing and editing records. They determine which fields, related lists, and custom links are visible to users, as well as the order and grouping of those elements.

To edit a Page Layout in Product Object

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	Last Modified By	Product ID
Blank Space	Minimum Stock Level	Product Name
Created By	Owner	Unit Price
Current Stock Level	Product Description	

Information (Header visible on edit only)

Product ID	Sample Text	Unit Price	₹123.45
Product Name	Sample Text	Current Stock Level	12,420
Product Description	Sample Text	Minimum Stock Level	21,114
		Owner	Sample Text

System Information (Header visible on edit only)

Created By Sample Text Last Modified By Sample Text

To edit a Page Layout in Purchase Order Object

Asset Relationship | Salesforce

https://brave-shark-bog9fa-dev-ed.trailblaze.lightning.force.com/lightning/setup/ObjectManager/AssetRelationship/PageLayouts/view

Setup Home Object Manager

SETUP > OBJECT MANAGER

Asset Relationship

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

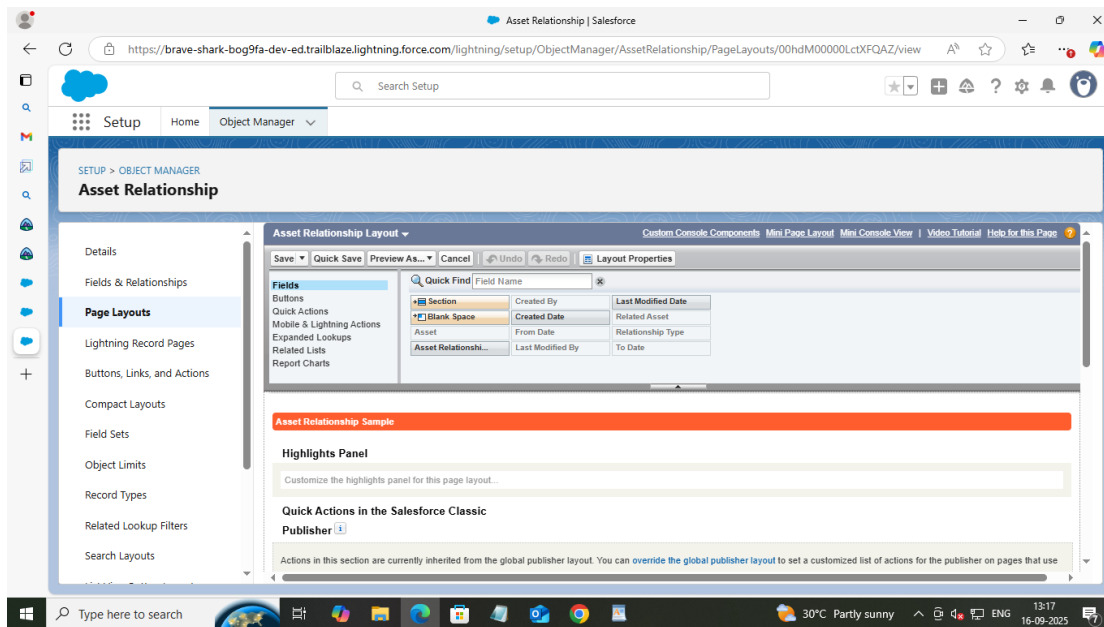
Page Layouts
1 Items, Sorted by Page Layout Name

Quick Find New Page Layout Assignment

PAGE LAYOUT NAME	CREATED BY	MODIFIED BY
Asset Relationship Layout	Page Layout Name	

Type here to search 30°C Partly sunny 13:16 16-09-2025

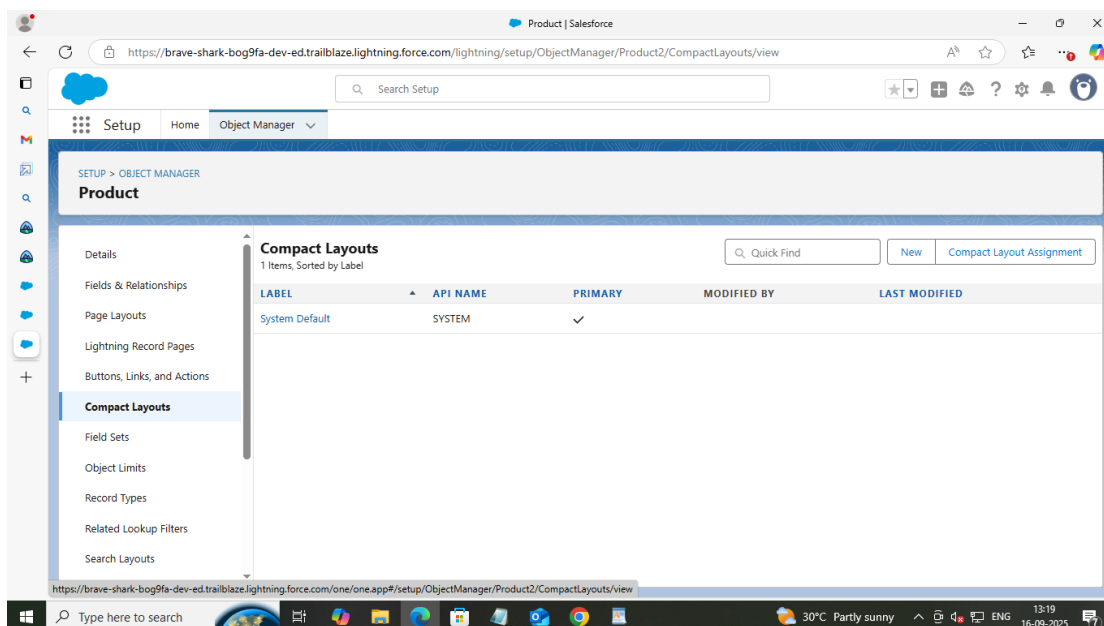
To edit a Page Layout in Order Item Object



Compact Layouts

Compact layouts display a record's key fields at a glance, providing important information quickly without needing to open the record.

To create a Compact Layout to a Product Object



Validation Rules

Validation rules in Salesforce are used to ensure data integrity by preventing users from saving invalid data in records. They consist of a formula or expression that evaluates the data in one or more fields and return a value of true or false. When the rule's criteria are met (i.e., the expression evaluates to true), an error message is displayed, and the user is prevented from saving the record until the issue is resolved.

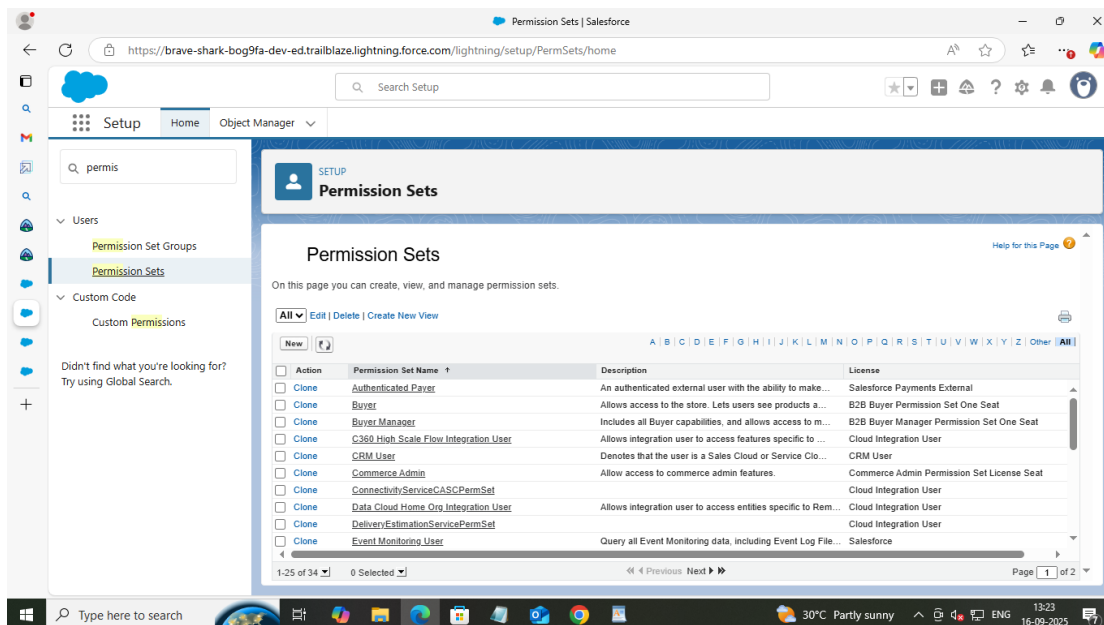
To create an Expected Delivery Date Validation rule to a Purchase Order Object

Profiles

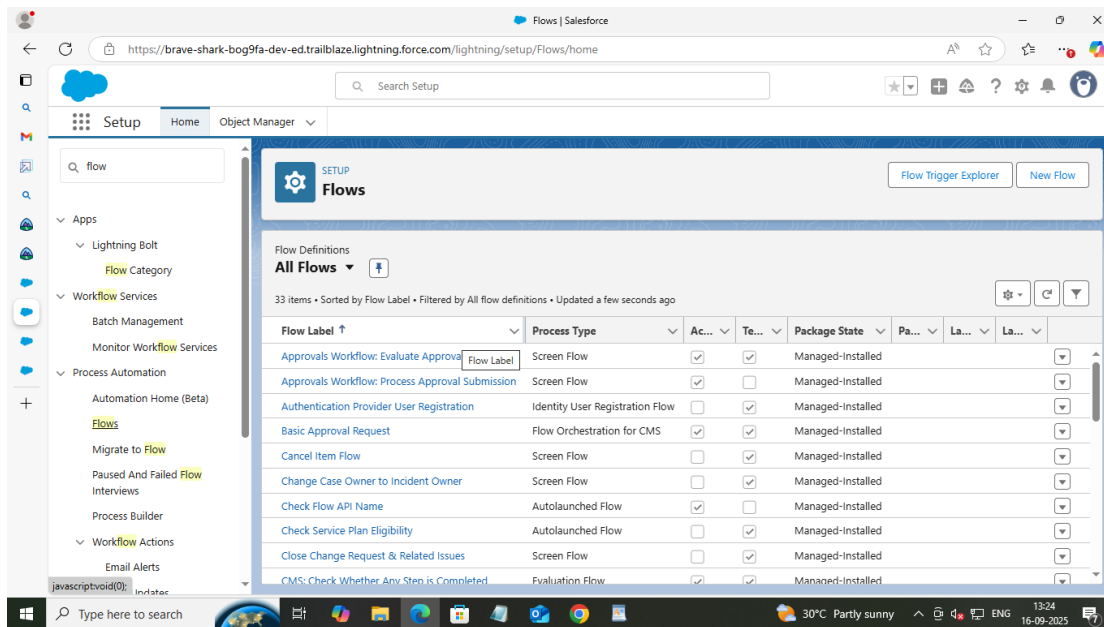
Profiles in Salesforce are fundamental to the platform's security model, defining what users can do within the organization. Profiles control a user's permissions to objects, fields, tabs, apps, and other settings. Each user in Salesforce must be assigned a profile, and the profile assigned to a user determines what they can see and do in the system.

Roles And Users

Create a Permission Set.

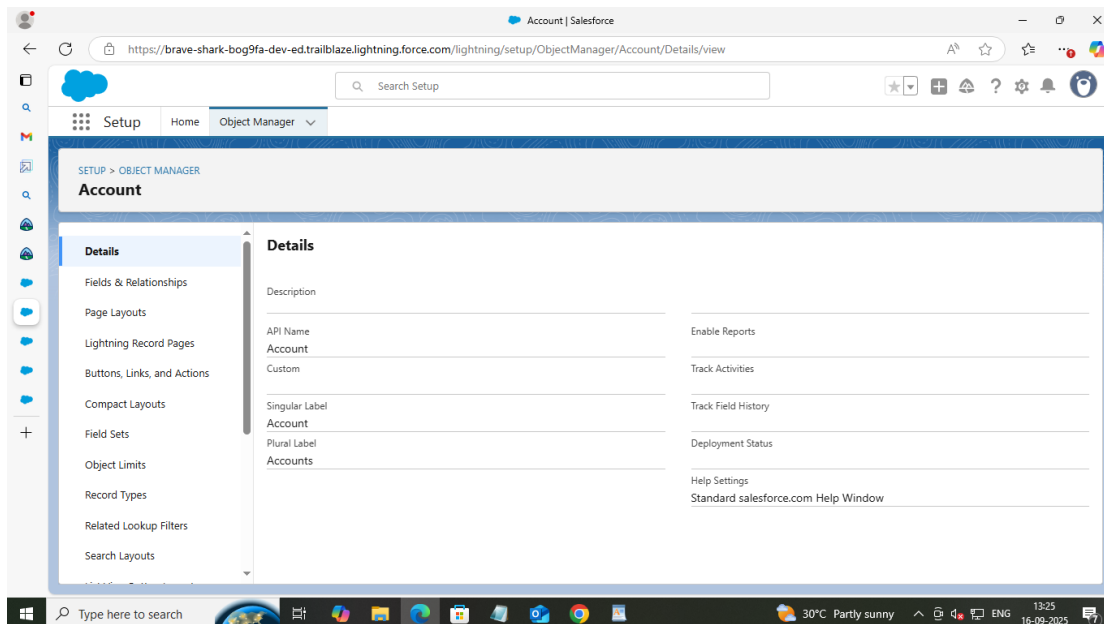


Create Flow to update the Actual Delivery Date.



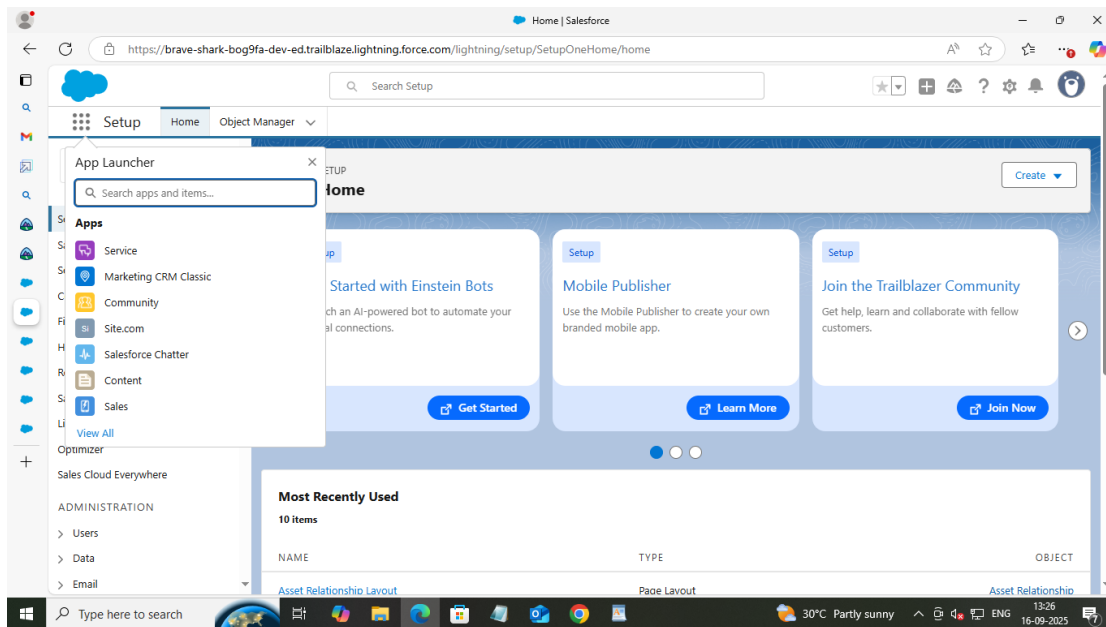
Triggers

Create a Trigger to Calculate total amount on Order Item.



Reports

Create a Purchase Orders based on Suppliers(Summary) Report



Create a Complete Purchase Details ReportDashboards

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.

Create Dashboard

View Dashboard

