

# **Medical Inventory Management**

**College Name:** Sri Krishna Adithya College of Arts and Science College

**Code:** Bruag

**TEAM ID:** NM2025TMID22665

**TEAM MEMBERS:4**

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# **Title: Medical Inventory Management**

## **Project Overview**

The Medical Inventory Management System is a comprehensive Salesforce application designed to streamline and automate the operational aspects of managing medical stock. The system maintains detailed supplier information, manages purchase orders, tracks products and order transactions, and monitors expiry dates.

With the help of custom objects, fields, validation rules, triggers, flows, reports, and dashboards, the application ensures:

- Accurate supplier management – maintaining detailed records including contact details.
- Efficient product tracking – product catalog with descriptions, stock levels, pricing, and expiry dates.
- Transparent purchase order management – track order dates, deliveries, and costs.
- Strong reporting & insights – supplier performance, order cost analysis, and product tracking.
- Automation & efficiency – streamline workflows, reduce manual work, and minimize errors.

## **Objectives**

- Streamline Inventory Management: Automate stock tracking, purchase orders, and supplier management.
- Enhance Accuracy: Monitor expiry dates, order costs, and delivery schedules to reduce risks.
- Improve Decision Making: Generate real-time reports on purchases, suppliers, and transactions.
- Ensure Transparency: Maintain detailed records of suppliers, products, and transactions.
- Promote Efficiency: Minimize delays in purchase order approvals and inventory movements.

## **Student Outcomes**

- Hands-on Salesforce Experience: Students gain practical exposure in Salesforce CRM development.

- **Understanding of Object Relationships:** Learn how to model and relate inventory entities like Supplier, Product, Purchase Order, and Order Items.
- **Data Validation Skills:** Apply rules to ensure data integrity (e.g., delivery dates, stock levels).
- **Real-Time Automation Exposure:** Work with flows and triggers to automate inventory updates.
- **Analytical Skills:** Generate and analyze meaningful reports and dashboards.
- **Industry-Relevant Knowledge:** Exposure to CRM-based supply chain and inventory solutions.

## **System Requirements**

### **Hardware Requirements**

- Minimum 4 GB RAM, Dual-core processor
- Stable internet connection

### **Software Requirements**

- Salesforce Developer Edition Org
- Modern Web Browser (Chrome / Firefox)

## **Project Phases**

Phase No.	Phase Name	Description	Pages
1	Requirement Analysis & Planning	Gather requirements from suppliers and staff; define scope and workflows.	4
2	Salesforce Development – Backend & Configurations	Create objects (Supplier, Product, Purchase Order, Order Item, Inventory Transaction), fields, and relationships.	5–15

3	UI/UX Development & Customization	Create Lightning App, Tabs, Layouts, and Compact Layouts.	16–25
4	Automation & Security	Implement Validation Rules, Profiles, Roles, Users, Permission Sets, Flows, and	26–40

		Triggers.	
5	Reporting & Dashboards	Configure Reports, Dashboards, and analytics for supplier and order tracking.	41–50
6	Deployment, Documentation & Maintenance	Finalize app, test features, deploy, and prepare documentation.	51–55

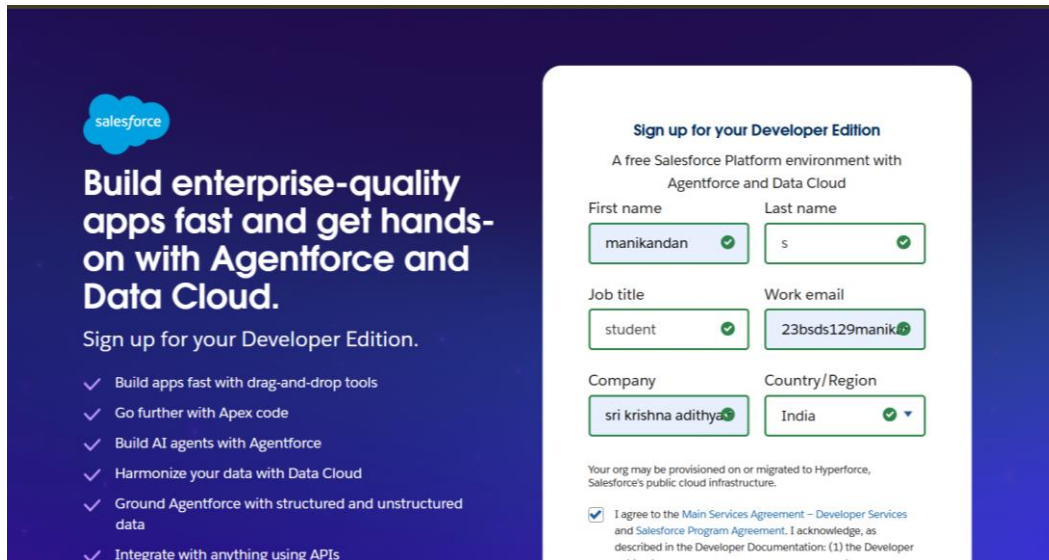
**Project Duration: 31 Hours**

## Project Flow (Milestones)

### 1. Creation of Developer Account

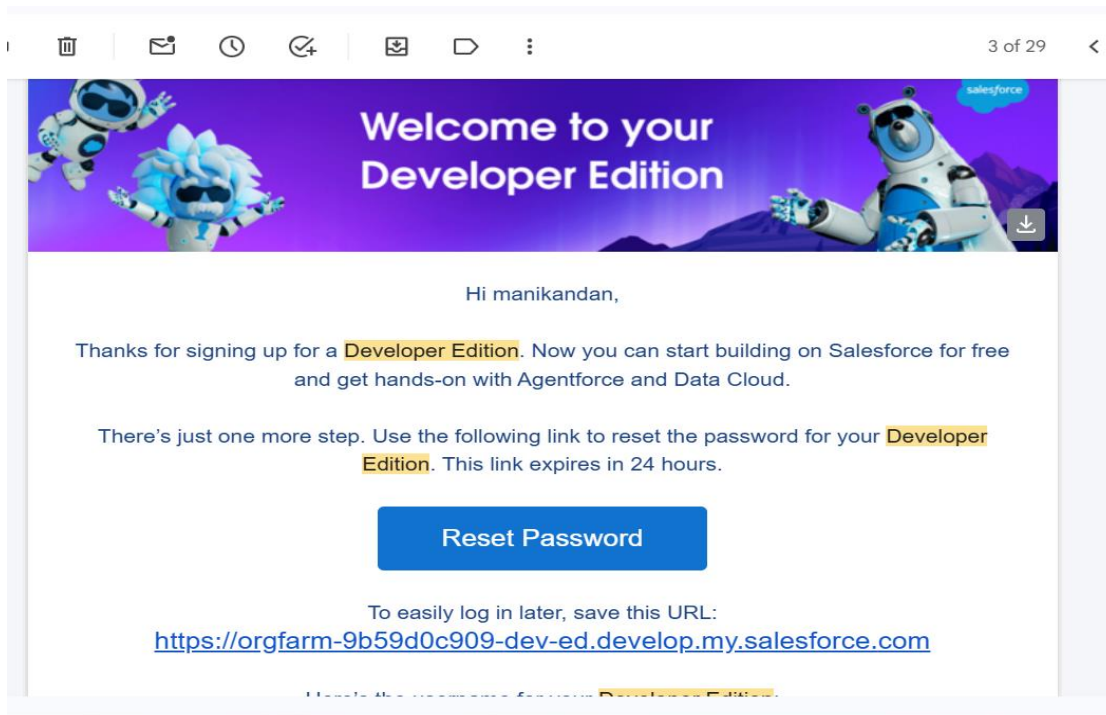
- Sign up for a free Salesforce Developer Account at <https://developer.salesforce.com/signup>.
- Fill in details: First & Last Name, Email, Role = Developer, Company = College Name, Country = India, Postal Code = XXXX.
- Choose a Username in the format: username@organization.com.

- Click Sign Me Up → Check email → Verify account.



The screenshot shows the Salesforce Developer Edition sign-up page. On the left, there is a blue background with the Salesforce logo and the text "Build enterprise-quality apps fast and get hands-on with Agentforce and Data Cloud." Below this, it says "Sign up for your Developer Edition." and lists six benefits with checkmarks: "Build apps fast with drag-and-drop tools", "Go further with Apex code", "Build AI agents with Agentforce", "Harmonize your data with Data Cloud", "Ground Agentforce with structured and unstructured data", and "Integrate with anything using APIs". On the right, there is a white form titled "Sign up for your Developer Edition" with the subtitle "A free Salesforce Platform environment with Agentforce and Data Cloud". The form contains several input fields: "First name" (manikandan), "Last name" (s), "Job title" (student), "Work email" (23bsds129manik), "Company" (sri krishna adithya), and "Country/Region" (India). Each field has a green checkmark indicating it is valid. At the bottom, there is a checkbox for "I agree to the Main Services Agreement -- Developer Services and Salesforce Program Agreement. I acknowledge, as described in the Developer Documentation: (1) the Developer..." which is checked. Below the checkbox, there is a small note: "Your org may be provisioned on or migrated to Hyperforce, Salesforce's public cloud infrastructure."

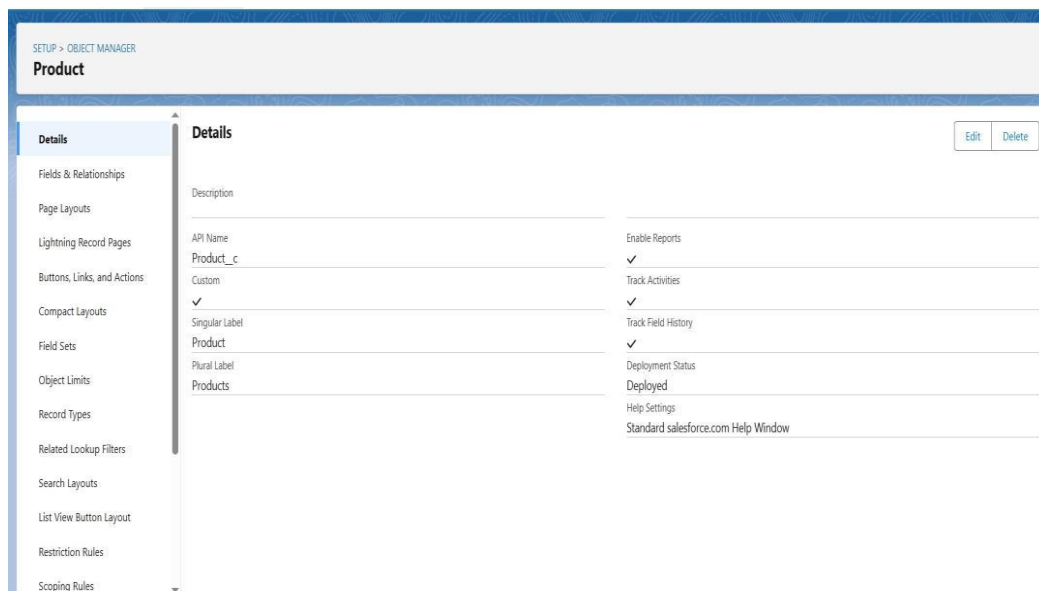
- Set password, security question → Login to Salesforce Org.



## 2. Object Creation

Objects are like database tables in Salesforce. Custom

Objects Created:



- Product → Product Name, Description, Unit Price, Expiry Date, Stock Level.
- Supplier → Supplier Name, Contact Person, Phone, Email.

SETUP > OBJECT MANAGER

## Purchase Order

**Details**

- Fields & Relationships
- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters
- Search Layouts
- List View Button Layout
- Restriction Rules
- Scoping Rules

**Details**

Edit Delete

Description

API Name  
Purchase\_Order\_\_c

Custom  
✓

Singular Label  
Purchase Order

Plural Label  
Purchase Orders

Enable Reports  
✓

Track Activities

Track Field History

Deployment Status  
Deployed

Help Settings  
Standard salesforce.com Help Window

- Purchase Order → Supplier (Lookup), Order Date, Delivery Date, Total Cost.
- Order Item → Product (Lookup), Quantity Ordered, Amount.
- Inventory Transaction → Transaction Date, Type (Picklist: Issue/Receipt), Total Order Cost.

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

**Details**

Edit Delete

Description

API Name  
Inventory\_Transaction\_\_c

Custom  
✓

Singular Label  
Inventory Transaction

Plural Label  
Inventory Transactions

Enable Reports  
✓

Track Activities  
✓

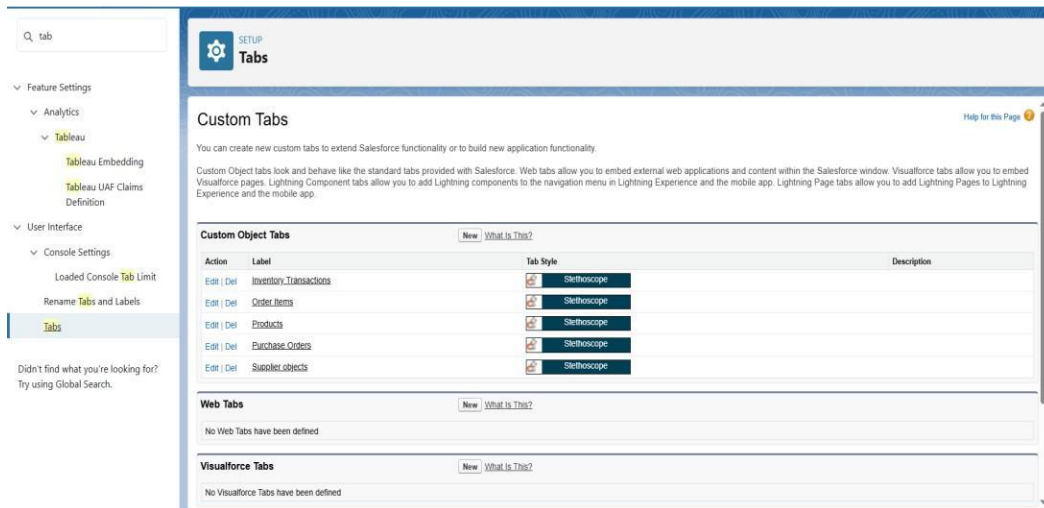
Track Field History

Deployment Status  
Deployed

Help Settings  
Standard salesforce.com Help Window

### 3. Tabs

- Create Tabs for each custom object to make them visible to users.
- Example: Product Tab → Setup → Tabs → New → Select Object → Choose Style → Save.



- Repeat for: Purchase Order, Order Item, Inventory Transaction, Supplier.

### 4. The Lightning App

- Go to Setup → App Manager → New Lightning App.
- Name: Medical Inventory Management.
- Add Navigation Items: Product, Supplier, Purchase Order, Order Item, Inventory Transaction, Reports, Dashboards.





## 5. Fields

- Create fields for each object.
- Examples:
  - *Product*: Product Name (Text), Description (Text Area), Unit Price (Currency), Stock Level (Number), Expiry Date (Date).
  - *Purchase Order*: Order Date (Date), Supplier (Lookup), Total Order Cost (Currency).
  - *Order Item*: Quantity Ordered (Number), Unit Price (Formula), Amount (Formula).
  - *Inventory Transaction*: Transaction Type (Picklist: Issue, Receipt, Adjustment).

Details	<b>Fields &amp; Relationships</b> 15 Items, Sorted by Field Label				
	<input type="text" value="Q Quick Find"/> <input type="button" value="New"/> <input type="button" value="Deleted Fields"/> <input type="button" value="Field Dependencies"/> <input type="button" value="Set History Tracking"/>				
<b>Fields &amp; Relationships</b>	<b>FIELD LABEL</b>	<b>FIELD NAME</b>	<b>DATA TYPE</b>	<b>CONTROLLING FIELD</b>	<b>INDEXED</b>
Page Layouts	Available Quantity	AvailableQuantity	Number(16, 2)		
Lightning Record Pages	Created By	CreatedById	Lookup(User)		
Buttons and Links	End Date	EndDate	Date		
Compact Layouts	Last Modified By	LastModifiedById	Lookup(User)		
Field Sets	Line Description	Description	Text(255)		
Object Limits	List Price	ListPrice	Currency(16, 2)		
Triggers	Order	OrderId	Lookup(Order)		✓
Flow Triggers	Order Product Number	OrderItemNumber	Auto Number		✓
Validation Rules	Original Order Product	OriginalOrderItemId	Lookup(Order Product)		✓
Conditional Field Formatting	Product	ProductId	Lookup(Product)		✓
	Quantity	Quantity	Number(16, 2)		
	Reference Price	ReferencePrice	Currency(16, 2)		

<b>Fields &amp; Relationships</b> 15 Items, Sorted by Field Label			<input type="text" value="Q Quick Find"/>	<input type="button" value="New"/>	<input type="button" value="Deleted Fields"/>	<input type="button" value="Field Dependencies"/>	<input type="button" value="Set History Tracking"/>
End Date	EndDate	Date					
Last Modified By	LastModifiedById	Lookup(User)					
Line Description	Description	Text(255)					
List Price	ListPrice	Currency(16, 2)					
Order	OrderId	Lookup(Order)					✓
Order Product Number	OrderItemNumber	Auto Number					✓
Original Order Product	OriginalOrderItemId	Lookup(Order Product)					✓
Product	ProductId	Lookup(Product)					✓
Quantity	Quantity	Number(16, 2)					
Reference Price	ReferencePrice	Currency(16, 2)					
Start Date	ServiceDate	Date					
Total Price	TotalPrice	Currency(16, 2)					
Unit Price	UnitPrice	Currency(16, 2)					

## 6. Page Layouts

The screenshot shows the 'Purchase Order Detail' page layout. The left sidebar contains navigation links: Details, Fields & Relationships, Page Layouts (selected), Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, and Restriction Rules. The main content area has a top bar with 'Save', 'Quick Save', 'Preview As...', 'Cancel', 'Undo', and 'Redo'. Below this is a 'Fields' section with a 'Quick Find' field and a list of fields including Section, Blank Space, Expected Delivery Date, Last Modified By, Actual Delivery Date, Order Count, Created By, Order Date, Order Item, Order Items, Owner, Product ID, Purchase Order ID, Purchase Order Name, Supplier ID, and Total Order Cost. The 'Purchase Order Detail' form includes sections for Information (Header visible on edit only), System Information (Header visible on edit only), and Custom Links (Header visible on edit only). The Information section contains fields like Purchase Order ID, Supplier ID, Order Date, Expected Delivery Date, Actual Delivery Date, Order Count, Total Order Cost, Owner, and Order Item. The System Information section contains fields like Created By and Last Modified By. The Custom Links section is empty.

- Customize layouts for each object.
- Example: Purchase Order Layout → Make *Order Date* Required, *Total Cost* Read-Only.

The screenshot shows the 'Inventory Transaction Detail' page layout. The left sidebar contains navigation links: Details, Fields & Relationships, Page Layouts (selected), Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, and Restriction Rules. The main content area has a top bar with 'Save', 'Quick Save', 'Preview As...', 'Cancel', 'Undo', and 'Redo'. Below this is a 'Fields' section with a 'Quick Find' field and a list of fields including Section, Blank Space, Last Modified By, Owner, Created By, Inventory Transaction, Purchase Order, Transaction Date, Purchase Order ID, Transaction ID, Total Order Cost, Transaction Type, and Total Order Cost. The 'Inventory Transaction Detail' form includes sections for Information (Header visible on edit only), System Information (Header visible on edit only), and Custom Links (Header visible on edit only). The Information section contains fields like Transaction ID, Purchase Order ID, Transaction Type, Transaction Date, Total Order Cost, Owner, and Transaction Name. The System Information section contains fields like Created By and Last Modified By. The Custom Links section is empty.

The screenshot shows the 'Product Information' page layout. The left sidebar contains navigation links: Details, Fields & Relationships, Page Layouts (selected), Lightning Record Pages, Buttons and Links, Compact Layouts, Field Sets, Object Limits, Triggers, Flow Triggers, Validation Rules, and Conditional Field Formatting. The main content area has a top bar with 'Save', 'Quick Save', 'Preview As...', 'Cancel', 'Undo', and 'Redo'. Below this is a 'Fields' section with a 'Quick Find' field and a list of fields including Section, Blank Space, Available Quantity, Line Description, Created By, Line Price, Product, Start Date, Order, Product Code, Total Price, Order Product Number, Quantity, Unit Price, Original Order Price, Reference Price, and Quantity. The 'Product Information' form includes sections for Product Information (Header visible on edit only), System Information (Header not visible), Description Information (Header not visible), and Additional Information (Header not visible). The Product Information section contains fields like Order, Product Code, Total Price, Order Product Number, Quantity, Unit Price, Line Description, Original Order Price, Reference Price, Product, and Quantity. The System Information section contains fields like Created By and Last Modified By. The Description Information section contains the Line Description field. The Additional Information section is empty.

- Arrange related fields logically.

## 7. Compact Layouts

- Create Compact Layouts to show important fields at record highlights.

The screenshot shows the 'Compact Layout Assignment' page for a 'Product Compact Layout'. On the left is a navigation menu with options: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts (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 has a 'Save' and 'Cancel' button at the top. Below is a section titled 'Primary Compact Layout' with the instruction: 'Select the compact layout to use when this object's records appear as list items in the mobile app.' A dropdown menu shows 'Primary Compact Layout: Product Compact Layout'. At the bottom are 'Save' and 'Cancel' buttons.

- *Product Compact Layout:* Product Name, Unit Price, Stock Level.
- *Purchase Order Compact Layout:* Order ID, Order Date, Supplier, Total Cost.

## 8. Validation Rules

- Add data quality rules. Example: Purchase Order Delivery Date Validation

The screenshot shows the 'Purchase Order Validation Rule' configuration page. The left navigation menu is the same as in the previous screenshot. The main content area is titled 'Purchase Order Validation Rule' and includes a 'Help for this Page' link. Below the title is a 'Validation Rule Edit' section with 'Save', 'Save & New', and 'Cancel' buttons. The 'Rule Name' is 'Expected\_Delivery\_Date\_Validation', 'Active' is checked, and there is a 'Description' field. Below this is the 'Error Condition Formula' section. It includes an example: 'Discount\_Percent\_c >= 30' and explains that if the formula is true, an error message will be displayed. The formula field contains '(Expected\_Delivery\_Date\_\_c - Order\_Date\_\_c) > 7'. To the right is a 'Functions' list with categories like ABS, ACOS, ADDMONTHS, AND, ASCII, and ASIN. Below the formula is a 'Check Syntax' button. The 'Error Message' section at the bottom shows an example: 'Discount percent cannot exceed 30%' and a text field containing 'The Expected Delivery Date should not exceed 7 days.' Below this is a note about error location and radio buttons for 'Top of Page' (selected) and 'Field'. At the bottom are 'Save', 'Save & New', and 'Cancel' buttons.

- $(\text{Expected\_Delivery\_Date\_c} - \text{Order\_Date\_c}) > 7$

Error: *Expected Delivery Date cannot exceed 7 days.*

## 9. Profiles

- Define user permissions.
- Profiles Created:

Inventory Manager → Access to Product & Inventory

Profile Edit  
Standard User

Set the permissions and page layouts for this profile.

Save Save & New Cancel

Name: Standard User  
User License: Salesforce Custom Profile: ☐

### Custom App Settings

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"/>
My Service Journey (standard__MSJApp)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Queue Management (standard__QueueManagement)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Sales (standard__LightningSales)	<input checked="" 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__LightningSalesConsole)	<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"/>

### Custom Object Permissions

	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 type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Products	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Order Items	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Purchase Orders	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Order Items	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Supplier objects	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Order Items	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>								

### Session Settings

Session Times Out After: 2 hours of inactivity  
Session Security Level Required at Login: --None--

### Password Policies

User passwords expire in: 90 days  
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  
Obscure secret answer for password resets: ☐  
Require a minimum 1 day password: ☐

- Purchase Manager → Access to Suppliers & Orders.

## 10. Roles

- Define record-level access.
- Roles Created:

Setup Home Object Manager

Search Setup

users

Users

User Edit

Save Save & New Cancel

General Information

First Name: Ram

Last Name: Krishna

Alias: k

Email: 230sds15b@vayabharathip@

Username: 230sds15b@vayabharathip@

Nickname: User175795672147569923

Title:

Company:

Department:

Division:

Role: Inventory Manager

User License: Salesforce

Profile: Inventory Manager

Active: ☒

Marketing User: ☐

Offline User: ☐

Knowledge User: ☐

Flow User: ☐

Service Cloud User: ☐

Site.com Contributor User: ☐

Site.com Publisher User: ☐

WDC User: ☐

Data.com User Type: --None--

Accessibility Mode (Classic Only): ☐

High Contrast Palette on Charts: ☐

Load Lightning Pages While Scrolling: ☒

Debug Mode: ☐

### Understanding Roles

Set up your Role Hierarchy to control how your organization reports on and accesses data.

#### Sample Role Hierarchy

View other sample Role Hierarchies: Territory-based Sample



Set Up Roles

☐ Don't show this page again

The image displays two screenshots of the Salesforce Setup Roles page. The top screenshot shows the 'Purchasing Manager' role being edited. The 'Role Edit' form includes fields for 'Label' (Purchasing Manager), 'Role Name' (Purchasing\_Manager), and 'Role Name as displayed on reports' (SVP: Sales & Marketing). The bottom screenshot shows the 'Inventory Manager' role being edited, with 'Label' (Inventory Manager), 'Role Name' (Inventory\_Manager), and 'Role Name as displayed on reports' (SVP: Sales & Marketing).

## 11. Users

- Add users and assign Roles & Profiles.
- Example:
  - John → Role: Purchase Manager, Profile: Purchase Manager.

The image shows the 'User Edit' form for 'John PuchaseM' in the Salesforce Setup Users page. The 'General Information' section includes fields for First Name (John), Last Name (PuchaseM), Alias (jpuch), Email (23bds158suytharathip@s), Username (rhd@gmail.com), Nickname (User175795051153481465), Title, Company, Department, and Division. The 'Role' is set to 'Purchasing Manager', 'User License' is 'Salesforce', and 'Profile' is 'Purchase Manager'. There are checkboxes for 'Active', 'Marketing User', 'Offline User', 'Knowledge User', 'Flow User', 'Service Cloud User', 'Site.com Contributor User', 'Site.com Publisher User', and 'WDC User'. The 'Data.com User Type' is set to '-None-', 'Data.com Monthly Addition Limit' is 300, and 'Accessibility Mode (Classic Only)' is checked.



User  
**Ram Krishna**

[Permission Set Assignments](#) | [Permission Set Assignments: Activation Required](#) | [Permission Set Group Assignments](#) | [Permission Set License Assignments](#) | [Personal Groups](#) | [Public Group Membership](#) | [Queue Membership](#) | [Team](#) | [Managers in the Role Hierarchy](#) | [OAuth Apps](#) | [Third-Party Account Links](#) | [Built-In Authenticators](#) | [Installed Mobile Apps](#) | [Authentication Settings for External Systems](#) | [Login History](#) | [User Provisioning Accounts](#)

[Edit](#) [Sharing](#) [Reset Password](#) [Freeze](#) [View Summary](#)

Name	Ram Krishna	Role	Inventory Manager
Alias	r kr	User License	Salesforce
Email	230sds158suyabharathip@skacas.ac.in <a href="#">Verify</a>	Profile	Inventory Manager
Username	230sds158suyabharathip@skacas.ac.in	Active	<input checked="" type="checkbox"/>
Nickname	User17579507214758992325 <a href="#">i</a>	Marketing User	<input type="checkbox"/>
Title		Offline User	<input type="checkbox"/>
Company		Knowledge User	<input type="checkbox"/>
Department		Flow User	<input type="checkbox"/>
Division		Service Cloud User	<input type="checkbox"/>
Address		Site.com Contributor User	<input type="checkbox"/>
Time Zone	(GMT-07:00) Pacific Daylight Time (America/Los_Angeles)	Site.com Publisher User	<input type="checkbox"/>
Locale	English (United States)	WDC User	<input type="checkbox"/>
Language	English	Mobile Push Registrations	<a href="#">View</a>
Delegated Approver		Data.com User Type	<a href="#">i</a>
Manager		Accessibility Mode (Classic Only)	<input type="checkbox"/> <a href="#">i</a>
Receive Approval Request Emails	Only if I am an approver	Debug Mode	<input type="checkbox"/> <a href="#">i</a>
Federation ID		High-Contrast Palette on Charts	<input type="checkbox"/> <a href="#">i</a>

User  
**John Puchasem**

[Permission Set Assignments](#) | [Permission Set Assignments: Activation Required](#) | [Permission Set Group Assignments](#) | [Permission Set License Assignments](#) | [Personal Groups](#) | [Public Group Membership](#) | [Queue Membership](#) | [Team](#) | [Managers in the Role Hierarchy](#) | [OAuth Apps](#) | [Third-Party Account Links](#) | [Built-In Authenticators](#) | [Installed Mobile Apps](#) | [Authentication Settings for External Systems](#) | [Login History](#) | [User Provisioning Accounts](#)

[Edit](#) [Sharing](#) [Reset Password](#) [Freeze](#) [View Summary](#)

Name	John Puchasem	Role	Purchasing Manager
Alias	jpuch	User License	Salesforce
Email	230sds158suyabharathip@skacas.ac.in <a href="#">Verify</a>	Profile	Purchase Manager
Username	rfd@gmail.com	Active	<input checked="" type="checkbox"/>
Nickname	User17579505115348146542 <a href="#">i</a>	Marketing User	<input type="checkbox"/>
Title		Offline User	<input type="checkbox"/>
Company		Knowledge User	<input type="checkbox"/>
Department		Flow User	<input type="checkbox"/>
Division		Service Cloud User	<input type="checkbox"/>
Address		Site.com Contributor User	<input type="checkbox"/>
Time Zone	(GMT-07:00) Pacific Daylight Time (America/Los_Angeles)	Site.com Publisher User	<input type="checkbox"/>
Locale	English (United States)	WDC User	<input type="checkbox"/>
Language	English	Mobile Push Registrations	<a href="#">View</a>
Delegated Approver		Data.com User Type	<a href="#">i</a>
Manager		Accessibility Mode (Classic Only)	<input type="checkbox"/> <a href="#">i</a>
Receive Approval Request Emails	Only if I am an approver	Debug Mode	<input type="checkbox"/> <a href="#">i</a>
Federation ID		High-Contrast Palette on Charts	<input type="checkbox"/> <a href="#">i</a>

- *Ram* → Role: Inventory Manager, Profile: Inventory Manager.
- **12. Permission Sets**

Permission Set  
**Purchase Manager Create Access 1**

[Find Settings...](#) [Clone](#) [Edit Properties](#) [Manage Assignments](#) [View Summary](#)

[Permission Set Overview](#) > [Object Settings](#) [Order Items](#)

[Edit](#)

**Tab Settings**

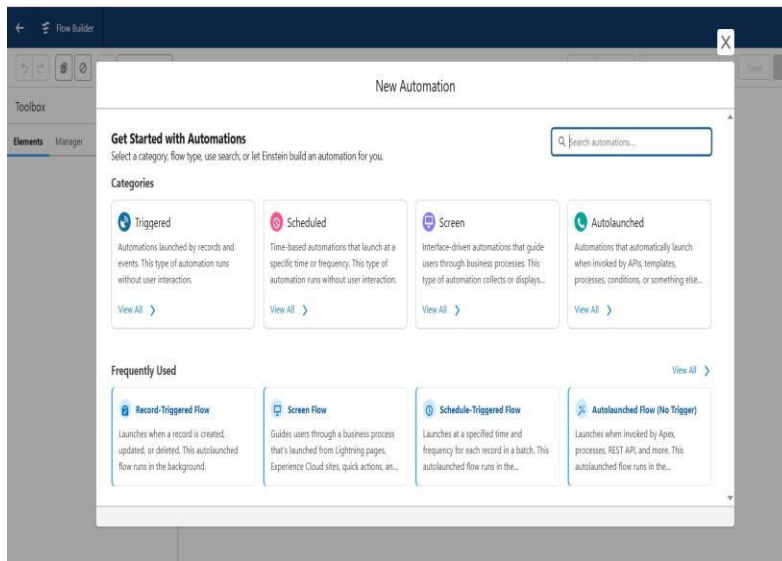
Available	Visible
<input type="checkbox"/>	<input checked="" type="checkbox"/> <a href="#">i</a>

**Object Permissions**

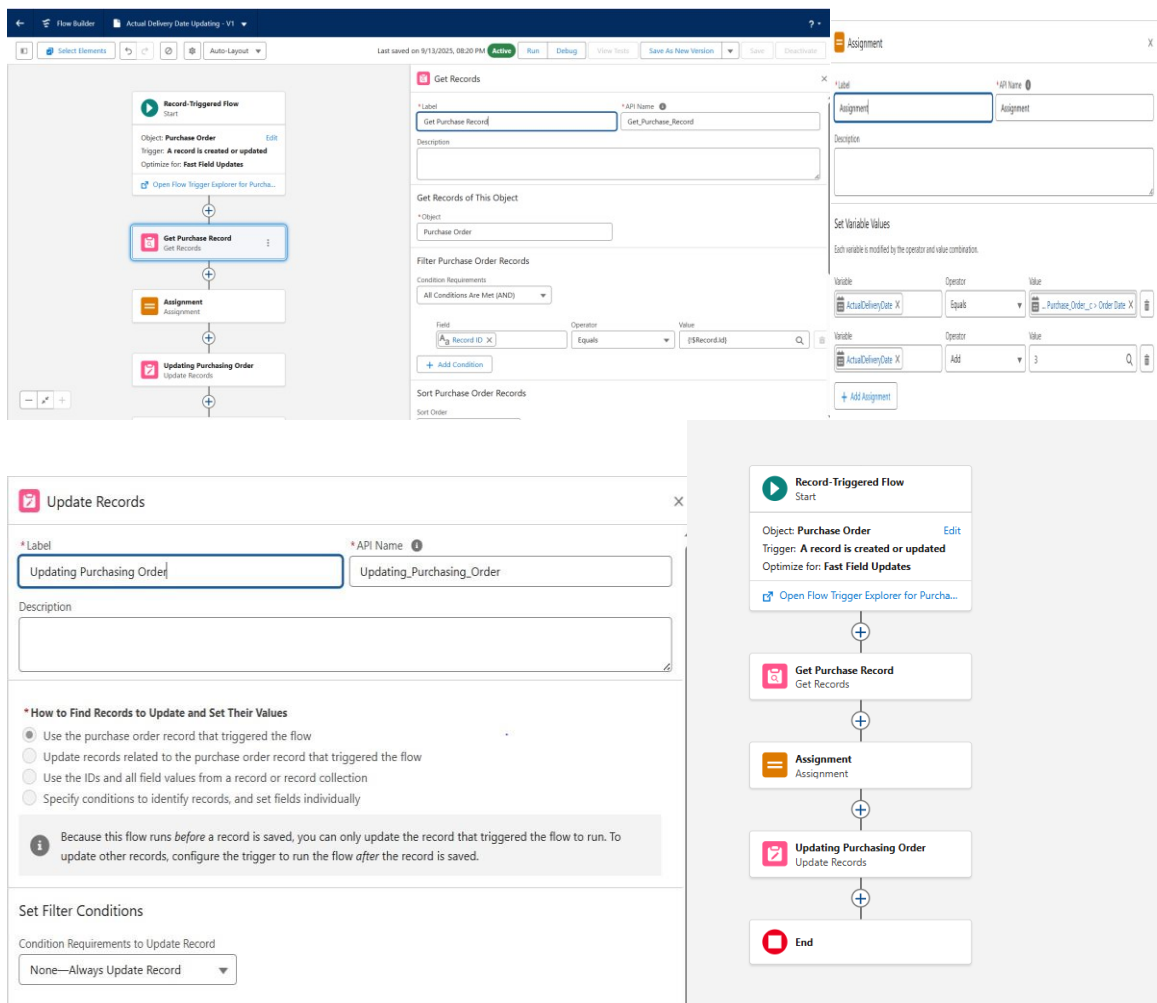
Permission Name	Enabled
Read	<input checked="" type="checkbox"/>
Create	<input checked="" type="checkbox"/>
Edit	<input type="checkbox"/>
Delete	<input type="checkbox"/>
View All Records	<input type="checkbox"/>
Modify All Records	<input type="checkbox"/>
View All Fields	<input type="checkbox"/>

- Extra access beyond profil





- Automate processes using Flows.
- Example: Auto-Update Actual Delivery Date = Order Date + 3 days.



## 14. Triggers

```

File • Edit • Debug • Test • Workspace • Help • < >
CalculateTotalAmountHandler • CalculateTotalAmountTrigger •
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, trigger.isUndelete);
6
7 }
8
9

```

- Use Apex Triggers for automation beyond Flows.
- Example: Trigger to calculate Total Order Cost from related Order Items and update PurchaseOrder.

```

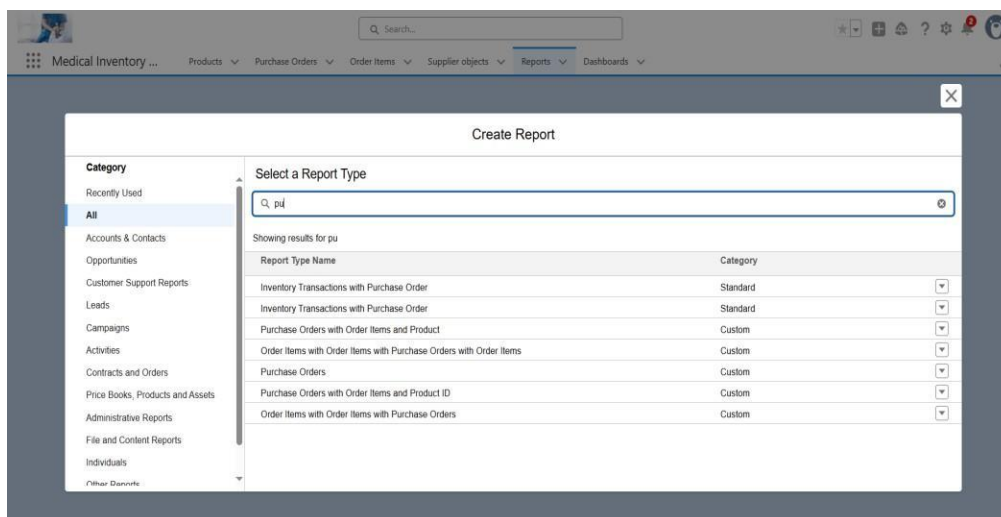
File • Edit • Debug • Test • Workspace • Help • < >
CalculateTotalAmountHandler • CalculateTotalAmountTrigger •
Code Coverage: None • API Version: 64 • Go To

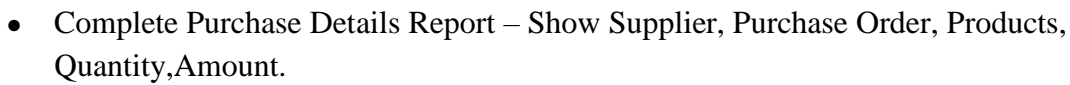
1 • public class CalculateTotalAmountHandler {
2
3
4
5     // Method to calculate the total amount for Purchase Orders based on related Order Items
6
7     public static void calculateTotal(List<Order_Item__c> newItems, List<Order_Item__c> oldItems, Boolean isInsert, Boolean isUpdate, Boolean isDelete)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

## 15. Reports

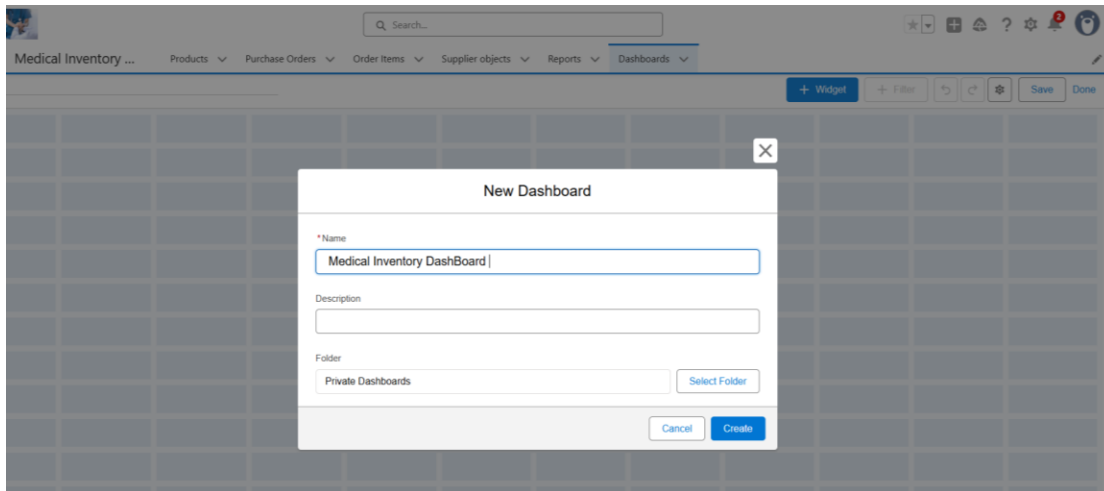
Purchase Orders by Supplier Report – Group by Supplier ID, show Total Order Cost.



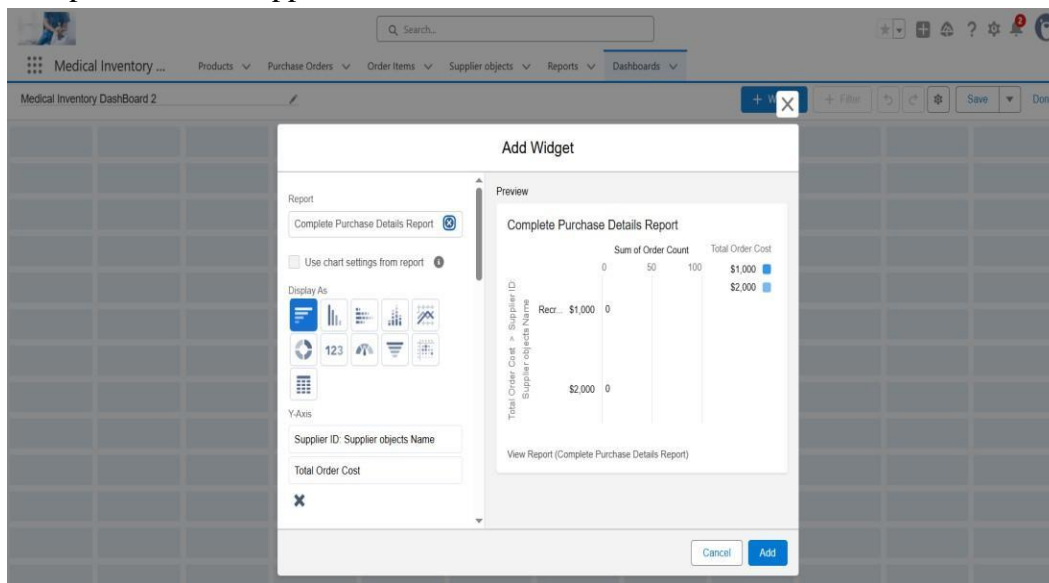


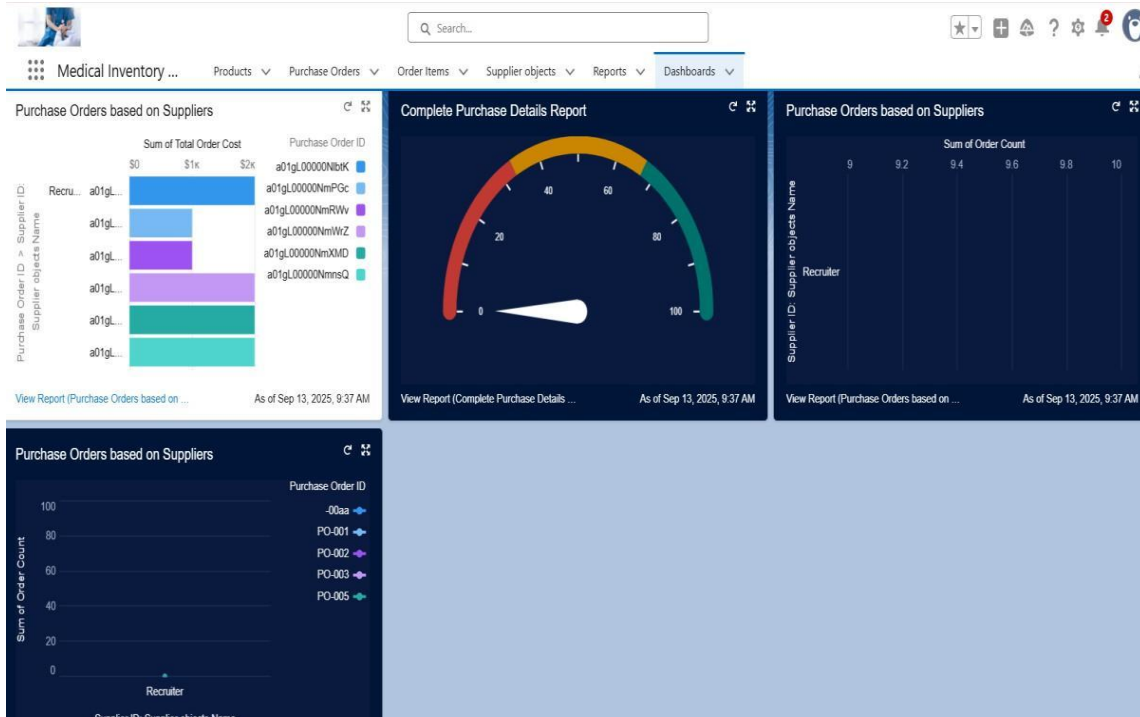
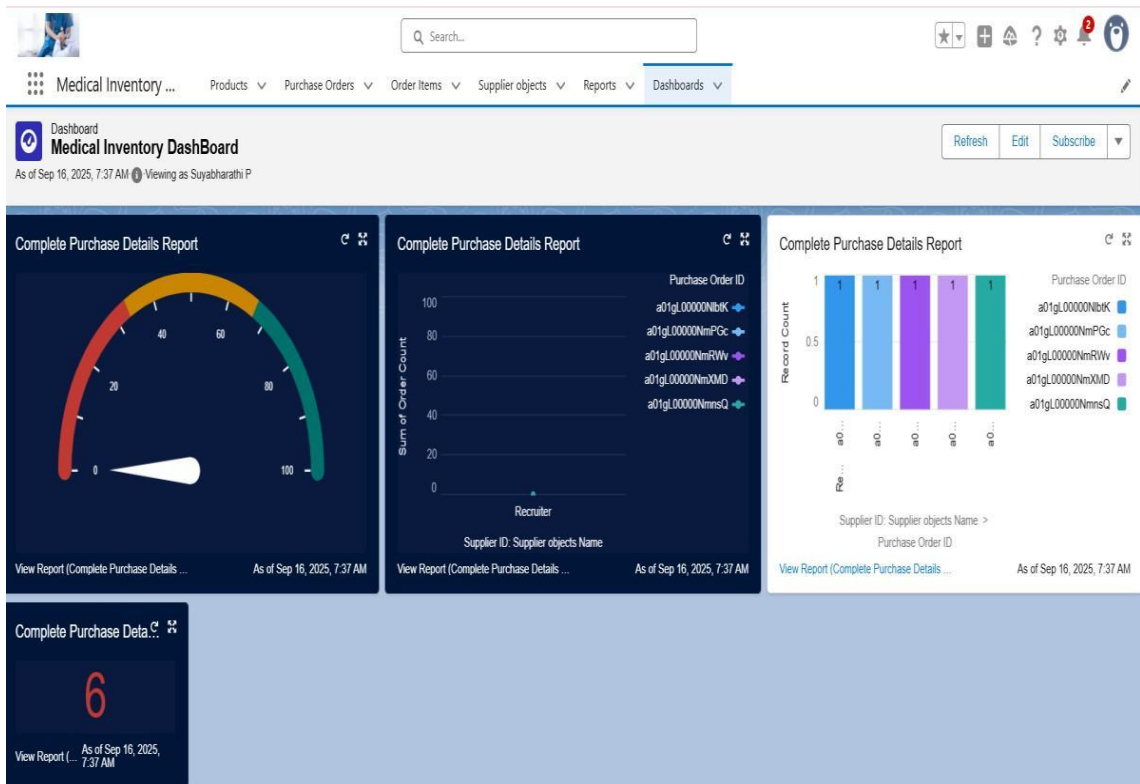
## 16. Dashboards

- Create Medical Inventory Dashboard.



- Components: Supplier-wise Orders, Stock Status, Total Costs.







## Conclusion

The **Medical Inventory Management System** developed on Salesforce successfully demonstrates how CRM platforms can be leveraged to manage real-time inventory operations in the medical field. By creating **custom objects, fields, validation rules, flows, triggers, reports, and dashboards**, the project ensures accurate tracking of suppliers, products, purchase orders, and inventory transactions.

### **Project Achievements:**

- Created a streamlined system for supplier and purchase order management.
- Automated order tracking and product stock updates using Flows and Triggers.
- Implemented strong security using Profiles, Roles, and Permission Sets.
- Generated real-time insights through Reports and Dashboards.

### **Student Learning Outcomes:**

- Hands-on Salesforce CRM skills in a real-time use case.
- Ability to design custom objects, automation, and security models.
- Improved teamwork and collaboration in managing project lifecycle.
- Exposure to industry practices in CRM and inventory management.

### **Future Scope:**

- Integration with barcode scanners for product entry.
- Mobile App support for order approvals and supplier management.
- Advanced AI-driven demand forecasting and stock optimization.
- Multi-branch scalability for large healthcare organizations.