

PROJECT TITLE : MEDICAL INVENTORY MANAGEMENT

SUBMITTED BY:

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DEPARTMENT :BE.COMPUTER SCIENCE AND ENGINEERING

COLLEGE NAME:IMAYAM COLLEGE OF ENGINEERING

TITLE : Medical Inventory Management

Category: Salesforce Developer

Skills Required:Salesforce Admin,Salesforce Developer

Project Description :

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.

Project Flow:

Milestone 1 : Creation of developer account

Milestone 2 : Object Creation

Milestone 3 : Tabs

Milestone 4 : The Lightning App

Milestone 5 : Fields

Milestone 6 : Updating of Page Layouts

Milestone 7 : Compact Layouts

Milestone 8 : Validation rule

Milestone 9 : Profiles

Milestone 10 : Roles

Milestone 11 : Users

Milestone 12 : Permission Sets

Milestone 13 : Flow

Milestone 14 : Triggers

Milestone 15 : Reports

Milestone 16 : Dashboards .

Milestone 17 : Conclusion

What you'll learn :

Real Time Salesforce Project

Object & their relationship in Salesforce

Page Layout

Validation Rules

Compact Layouts

Profiles

Roles

Users

Permission Sets

Triggers

Flows

Reports

Dashboards

Milestone 1-Salesforce Account

Introduction:

Are you new to Salesforce? Not sure exactly what it is, or how to use it? Don't know where you should start on your learning journey? If you've answered yes to any of these questions, then you're in the right place. This module is for you.

Welcome to Salesforce! Salesforce is game-changing technology, with a host of productivity-boosting features, that will help you sell smarter and faster. As you work toward your badge for this module, we'll take you through these features and answer the question, "What is Salesforce, anyway?"

What Is Salesforce?

Salesforce is your customer success platform, designed to help you sell, service, market, analyze, and connect with your customers.

Salesforce has everything you need to run your business from anywhere. Using standard products and features, you can manage relationships with prospects and customers, collaborate and engage with employees and partners, and store your data securely in the cloud. So what does that really mean? Well, before Salesforce, your contacts, emails, follow-up tasks, and prospective deals might have been organized something like this:

<https://youtu.be/r9EX3IGde5k>

Activity 1: Creating Developer Account

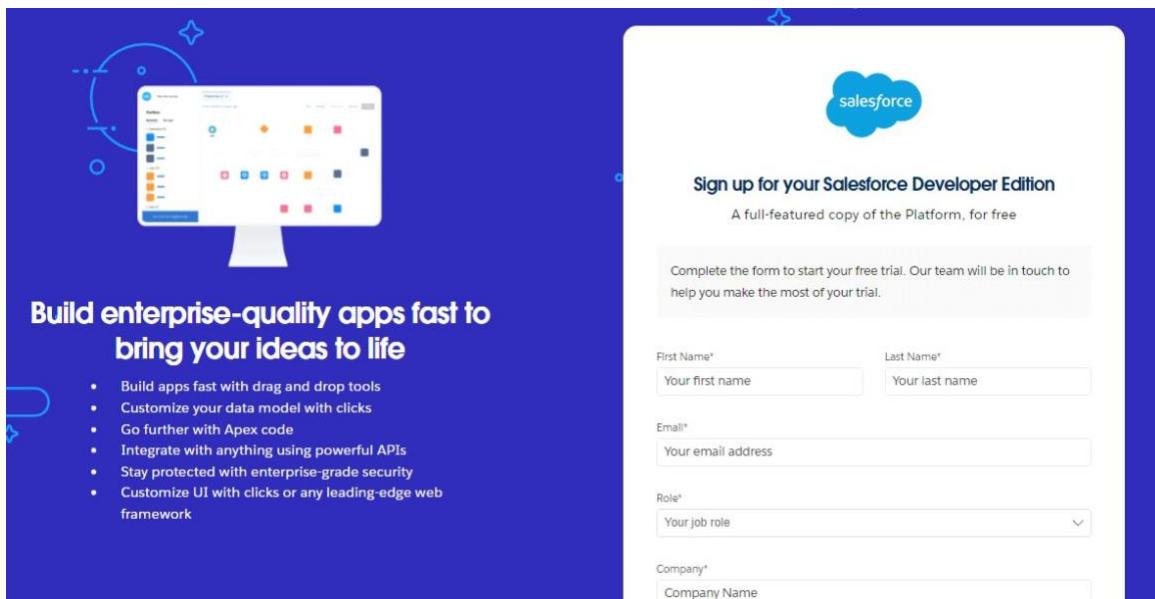
Duration: 0.1 Hrs

Skill Tags:

1. Creating a developer org in salesforce.

Go to <https://developer.salesforce.com/signup> the sign up form, enter the following

2. details :



1. First name & Last name

2. Email

3. Role : Developer

4. Company : College Name

5. County : India

6. Postal Code : pin code

7. Username : should be a combination of your name and company

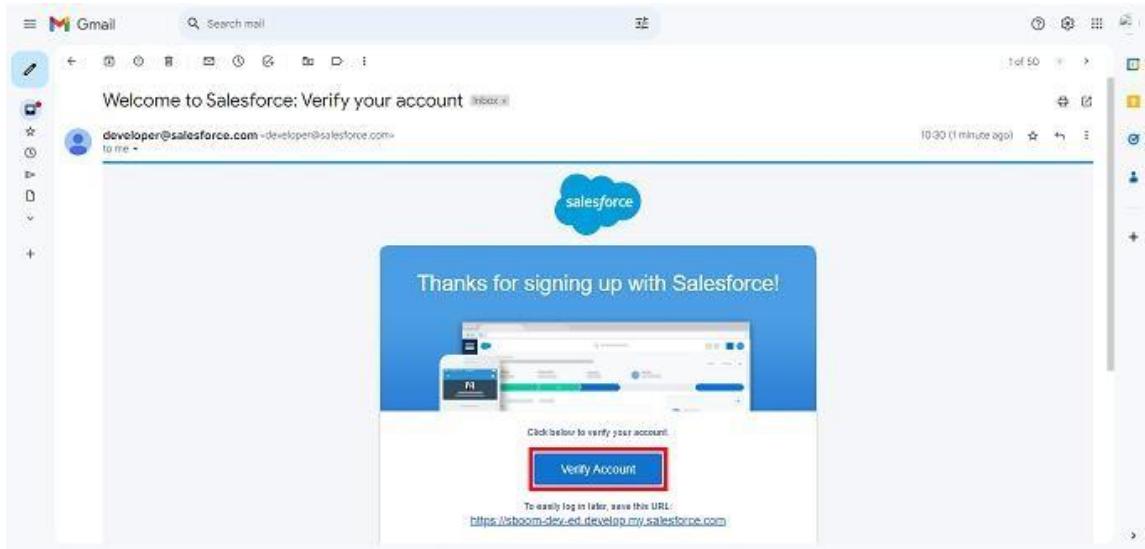
This need not be an actual email id, you can give anything in the format :
username@organization.com

Activity 2: Account Activation

Duration: 0.1 Hrs

Skill Tags:

1. Go to the inbox of the email that you used while signing up. Click on the verify account to activate your account. The email may take 5-10mins.



2. Click on Verify Account

3. Give a password and answer a security question and click on change password.



Change Your Password

Enter a new password for lead@sb.oom.

Make sure to include at least:

- ✓ 8 characters
- ✓ 1 letter
- ✓ 1 number

*** New Password**

Good

*** Confirm New Password**

Match

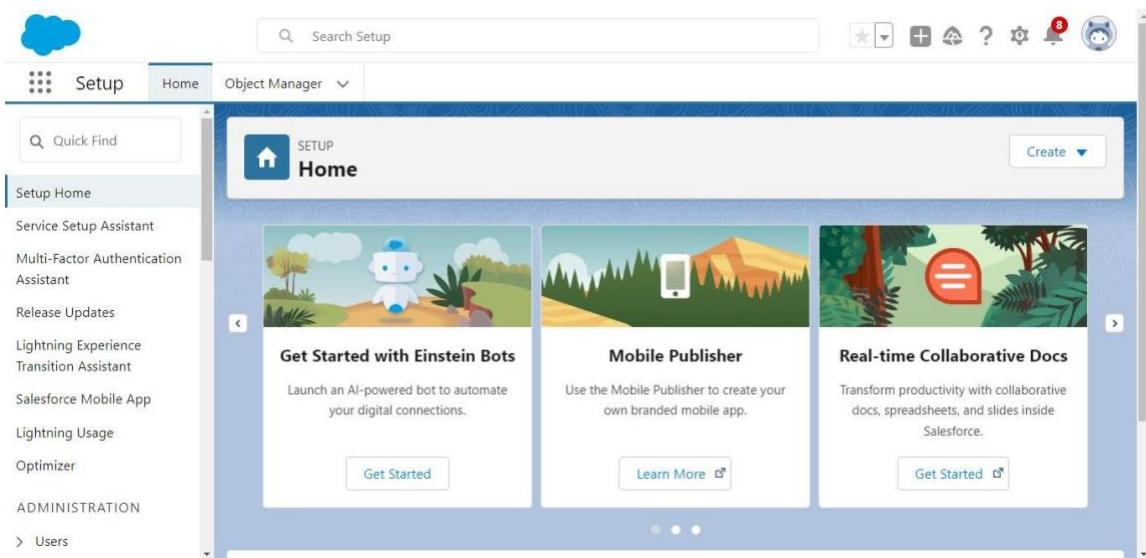
Security Question

In what city were you born?

*** Answer**

Change Password

4. Then you will redirect to your salesforce setup page.



The screenshot shows the Salesforce Setup Home page. The top navigation bar includes a cloud icon, 'Setup', 'Home', 'Object Manager', and various status indicators. The left sidebar contains links 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 'Users' link. The main content area is titled 'SETUP Home' and features three cards: 'Get Started with Einstein Bots', 'Mobile Publisher', and 'Real-time Collaborative Docs'. Each card has a 'Get Started' button.

Milestone 2- Objects

In Salesforce, objects are database tables that allow you to store data specific to your organization.

Milestone 1-Salesforce Account

Introduction:

Are you new to Salesforce? Not sure exactly what it is, or how to use it? Don't know where you should start on your learning journey? If you've answered yes to any of these questions, then you're in the right place. This module is for you.

Welcome to Salesforce! Salesforce is game-changing technology, with a host of productivity-boosting features, that will help you sell smarter and faster. As you work toward your badge for this module, we'll take you through these features and answer the question, "What is Salesforce, anyway?" .

What Is Salesforce?

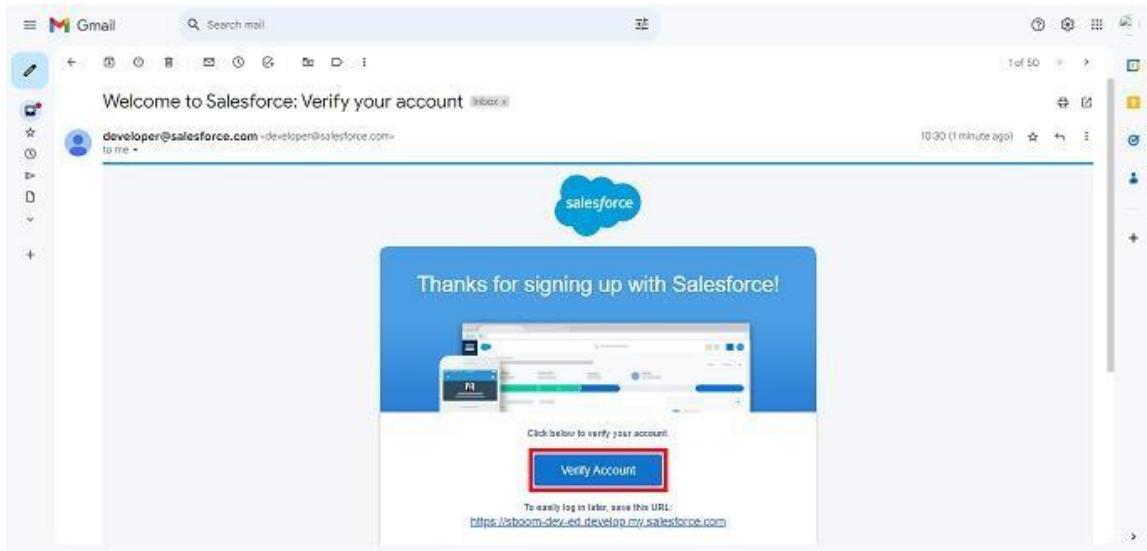
Salesforce is your customer success platform, designed to help you sell, service, market, analyze, and connect with your customers.

Salesforce has everything you need to run your business from anywhere. Using standard products and features, you can manage relationships with prospects and customers, collaborate and engage with employees and partners, and store your data securely in the cloud. So what does that really mean? Well, before Salesforce, your contacts, emails, follow-up tasks, and prospective deals might have been organized something like this:

<https://youtu.be/r9EX3IGde5k>

Activity 2: Account Activation

1. Go to the inbox of the email that you used while signing up. Click on the verify account to activate your account. The email may take 5-10mins.



2. Click on Verify Account

3. Give a password and answer a security question and click on change password.

The screenshot shows the 'Change Your Password' page in the Salesforce setup interface. At the top, it says 'Change Your Password'. Below that, it asks to enter a new password for 'lead@sb.oom.' and provides instructions: 'Make sure to include at least:' followed by three requirements with green checkmarks: '8 characters', '1 letter', and '1 number'. A red box highlights the password input fields. The first field is labeled '* New Password' and contains '.....' with a status 'Good'. The second field is labeled '* Confirm New Password' and contains '.....' with a status 'Match'. Below these is a 'Security Question' section with a dropdown menu showing 'In what city were you born?'. Underneath is an 'Answer' field containing 'asdfghjkl'. At the bottom is a large blue 'Change Password' button.

4. Then you will redirect to your salesforce setup page.

The screenshot shows the Salesforce Setup Home page. The left sidebar is titled 'Setup' and includes links such as '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 'Users' link. The main content area is titled 'Home' and features three cards: 'Get Started with Einstein Bots', 'Mobile Publisher', and 'Real-time Collaborative Docs'. Each card has a 'Get Started' or 'Learn More' button. The top navigation bar includes 'Search Setup', 'Object Manager', and various icons for account management.

Milestone 3- Tabs

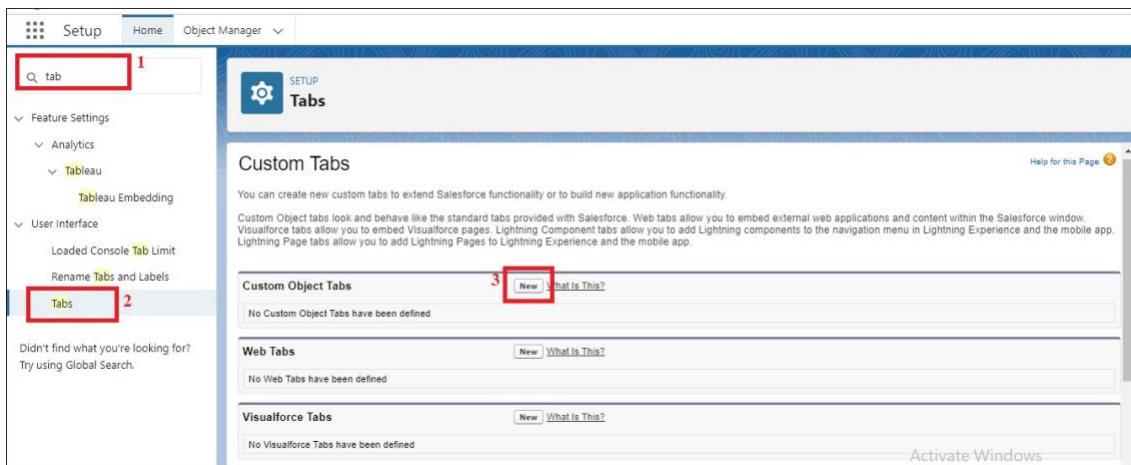
In Salesforce, tabs are used to make the data stored in objects accessible to users through the user interface. Tabs are a fundamental part of the Salesforce interface, providing a way to navigate to different objects and records.

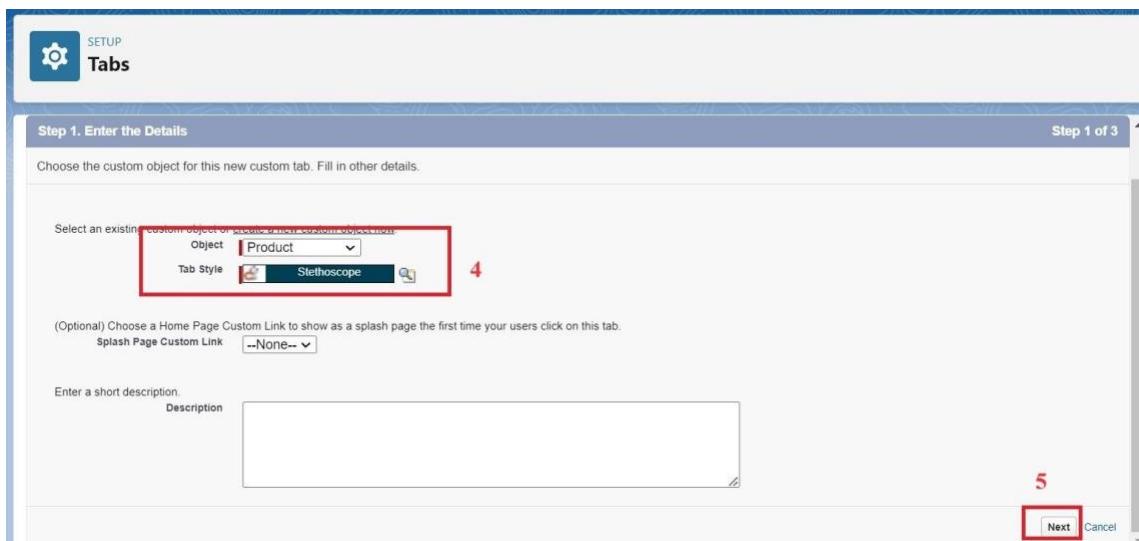
Activity 1: Creating a tab for Product Object

Duration: 0.1 Hrs

Skill Tags:

1. Go to the setup page >> type Tabs in Quick Find bar
2. Click on tabs
3. Click on New (under custom object tab).
4. Select Object(Product) >> Select the tab style
5. Click on Next >> (Add to profiles page) keep it as default >> Click on Next (Add to Custom App) uncheck the include tab .
6. Make sure that the Append tab to user's existing personal customizations is checked.
7. Click save





Activity 2: Creating Remaining Tabs

Duration: 0.1 Hrs

Skill Tags:

1. Now create the Tabs for the remaining Objects, they are Purchase Order, Order Item, Inventory Transaction, Supplier
2. Follow the same steps as mentioned in Activity -1 .

Milestone 3- Tabs

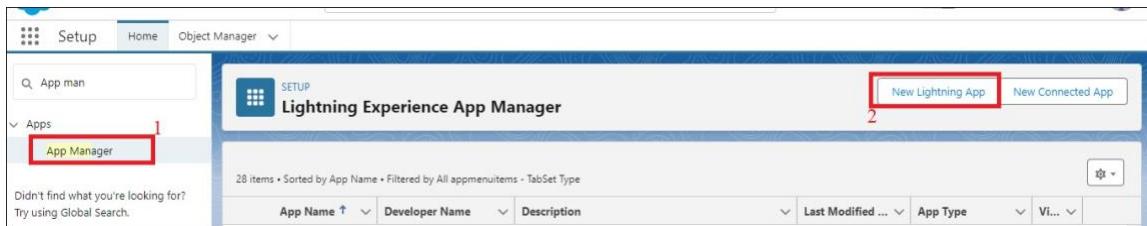
In Salesforce, tabs are used to make the data stored in objects accessible to users through the user interface. Tabs are a fundamental part of the Salesforce interface, providing a way to navigate to different objects and records.

Activity 1: Create a Lightning App for Medical Inventory Management

Duration: 0.2 Hrs

Skill Tags:

1. From Setup, enter App Manager in the Quick Find and select App Manager.
2. Click New Lightning App.
3. Enter Medical Inventory Management as the App Name >> Click on upload image and add an image related to Medical Inventory then click next
4. Under App Options, leave the default selections and click next.
5. Under Utility Items, leave as is and click Next.
6. From Available Items, select Products, Purchase Orders, Order Items, Inventory Transactions, Suppliers, Reports, and Dashboards and move them to Selected Item and Click Next.
7. From Available Profiles, select System Administrator and move it to Selected Profiles.
8. Click Save & Finish.



New Lightning App

App Details

3 * App Name

* Developer Name

Description

App Branding

Image 3

Primary Color Hex
Value

Org Theme Options
 Use the app's image and color instead of the org's custom theme

Ann Launcher Preview

Next

Navigation Items

Choose the items to include in the app, and arrange the order in which they appear. Users can personalize the navigation to add or move items, but users can't remove or rename the items that you add. Some navigation items are available only for phone or only for desktop. These items are dropped from the navigation bar when the app is viewed in a format that the item doesn't support.

Available Items

Selected Items

	Products
	Purchase Orders
	Order Items
	Inventory Transactions
	Suppliers
	Reports

6

New Lightning App

User Profiles

Choose the user profiles that can access this app.

7

Available Profiles

<input type="text" value="system"/>
System Administrator

Selected Profiles

8 Save & Finish

Back

Progress Bar: Step 1 of 8

Activity 2: Creating Remaining Tabs

Duration: 0.1 Hrs

Skill Tags:

1. Now create the Tabs for the remaining Objects, they are Purchase Order, Order Item, Inventory Transaction, Supplier .
2. Follow the same steps as mentioned in Activity -1 .

Milestone 3- Tabs

In Salesforce, tabs are used to make the data stored in objects accessible to users through the user interface. Tabs are a fundamental part of the Salesforce interface, providing a way to navigate to different objects and records.

Activity 1: Create a Lightning App for Medical Inventory Management

Duration: 0.2 Hrs

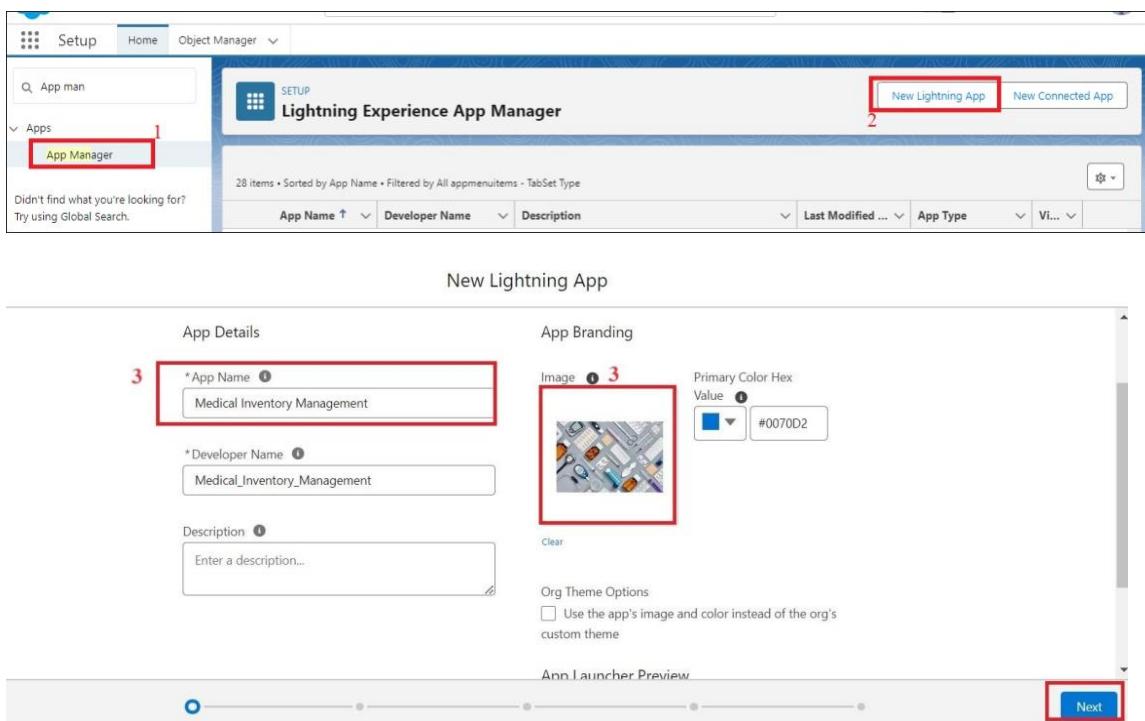
Skill Tags:

1. From Setup, enter App Manager in the Quick Find and select App Manager.
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3. Enter Medical Inventory Management as the App Name >> Click on upload image and add an image related to Medical Inventory then click next
4. Under App Options, leave the default selections and click next.
5. Under Utility Items, leave as is and click Next.

6. From Available Items, select Products, Purchase Orders, Order Items, Inventory Transactions, Suppliers, Reports, and Dashboards and move them to Selected Item and Click Next.

7. From Available Profiles, select System Administrator and move it to Selected Profiles.

8. Click Save & Finish.



Navigation Items

Choose the items to include in the app, and arrange the order in which they appear. Users can personalize the navigation to add or move items, but users can't remove or rename the items that you add. Some navigation items are available only for phone or only for desktop. These items are dropped from the navigation bar when the app is viewed in a format that the item doesn't support.

The screenshot shows the 'Available Items' section of the Lightning App Builder. It includes a search bar with the placeholder 'Dash' and a list of items: 'Dash' and 'Dashboards'. To the right, there is a 'Selected Items' list containing 'Products', 'Purchase Orders', 'Order Items', 'Inventory Transactions', 'Suppliers', and 'Reports'. Navigation arrows (right and left) are positioned between the two lists.

6

The screenshot shows the 'User Profiles' section of the Lightning App Builder. It has a search bar with the placeholder 'system' and a list of profiles: 'System Administrator'. To the right, there is a 'Selected Profiles' list which is currently empty. At the bottom, there is a progress bar with five steps and a 'Save & Finish' button highlighted with a red box.

7

8

Milestone 4- 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.

Activity 1: Creating a Text Field in Product Object

Duration: 0.05 Hrs

Skill Tags:

- 1. To create fields in an object:**
- 2. Click the gear icon and select Setup. This launches Setup in a new tab.**
- 3. Click the Object Manager tab next to Home.**
- 4. Select Product custom object.**
- 5. Select Fields & Relationships from the left navigation**
- 6. Click on New**
- 7. Select Text field, click Next**
- 8. Enter Field Label as Product Name and Length 255.**
- 9. Select Required Field.**
- 10. Click Next, Next, then Save & New.**

The screenshot shows the Salesforce Object Manager interface. At the top, there are tabs for Setup, Home, and Object Manager, with Object Manager selected. A red box highlights the 'Object Manager' tab. In the center, there's a search bar with 'Product' typed into it, and buttons for Schema Builder and Create. Below the search bar, a message says '9 items, Sorted by Label'. The main area is a table titled 'Object Manager' with columns: LABEL, API NAME, TYPE, DESCRIPTION, LAST MODIFIED, and DEPLOYED. A row for 'Product' is selected, highlighted with a red box. The 'API NAME' column shows 'Product_c' with a red box around it and the number '3' to its right. The 'TYPE' column indicates it's a 'Custom Object'. The 'LAST MODIFIED' column shows '18/06/2024'. The 'DEPLOYED' column has a checkmark and a dropdown arrow. The table header includes 'LABEL' and 'API NAME' with arrows for sorting.

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Fulfillment Order Product	FulfillmentOrderLineItem	Standard Object			
Opportunity Product	OpportunityLineItem	Standard Object			
Order Product	OrderItem	Standard Object			
Product	Product_c	Custom Object		18/06/2024	✓
Product	Product2	Standard Object			
Product Attribute	ProductAttribute	Standard Object			

Setup **Home** **Object Manager**

Product

Fields & Relationships

4

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)		✓
Product ID	Name	Text(80)		✓

clicking Send an Email. Note that custom email addresses cannot be used for mass emails.

- Geolocation
- Number
- Percent
- Phone
- Picklist
- Picklist (Multi-Select)
- Text
- Text Area
- Text Area (Long)
- Text Area (Rich)
- Text (Encrypted) 5
- Time
- URL

6

Next Cancel

Step 2. Enter the details

Step 2 of 4

Previous Next Cancel

9

Field Label	Product Name	7
Please enter the maximum length for a text field below.		
Length	255	7
Field Name	Product	7
Description		
Help Text		
Required	<input checked="" type="checkbox"/> Always require a value in this field in order to save a record	8
Unique	<input type="checkbox"/> Do not allow duplicate values	
<input type="radio"/> Treat "ABC" and "abc" as duplicate values (case insensitive) <input type="radio"/> Treat "ABC" and "abc" as different values (case sensitive)		
External ID	<input type="checkbox"/> Set this field as the unique record identifier from an external system	
Auto add to custom report type	<input checked="" type="checkbox"/> Add this field to existing custom report types that contain this entity 9	

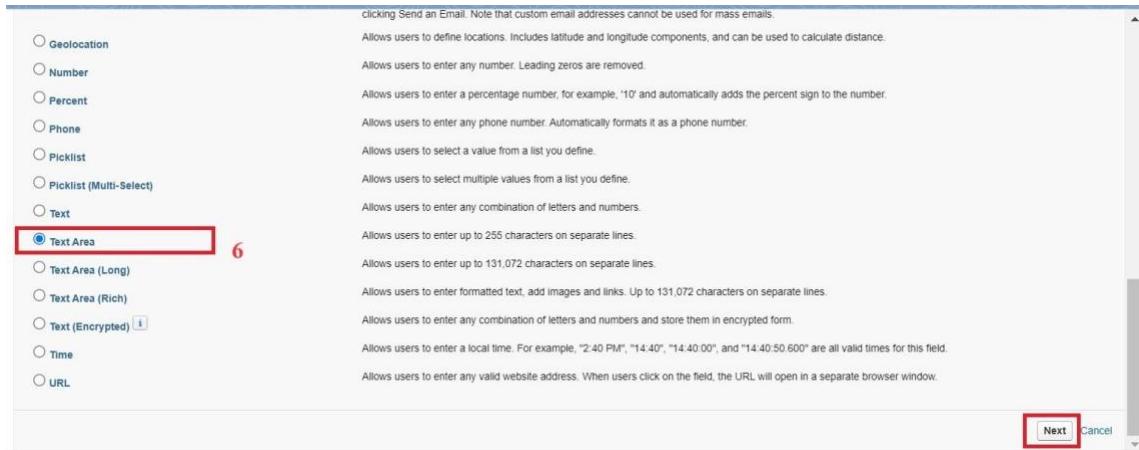
Activity 2: Creating a TextArea Field in Product Object

Duration: 0.05 Hrs

Skill Tags:

To create fields in an object:

1. Click the gear icon and select Setup. This launches Setup in a new tab.
2. Click the Object Manager tab next to Home.
3. Select Product custom object
4. Select Fields & Relationships from the left navigation
5. Click on New
6. Select TextArea field, click Next
7. Enter Field Label as **Product Description**
8. Click Next, Next, then Save & New.



Step 2. Enter the details Step 2 of 4

Field Label 7

Field Name 8

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 \$CustomMetadataType__mdt RecordAPIName Field__c

Activity 3: Creating a Number Field in Product object

Duration: 0.05 Hrs

Skill Tags:

To create fields in an object:

1. Go to setup >> click on Object Manager >> type object name(Product) in quick find box >> click on the Product custom object.
2. Now click on **Fields & Relationships**
3. Click on New.
4. Select Data type as **Number** and click Next.
5. Enter Field Label as **Current Stock Level**
6. Length - 18, Decimal Places - 0.
7. Click on Next, Next and Save.

Step 2. Enter the details

Step 2 of 4

Field Label: Current Stock Level 5

Please enter the length of the number and the number of decimal places. For example, a number with a length of 8 and 2 decimal places can accept values up to "12345678.90".

Length: 18 Decimal Places: 0

Field Name: Current_Stock_Level 6

Description:

Help Text:

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

Unique Do not allow duplicate values

External ID Set this field as the unique record identifier from an external system

7 Previous Next Cancel

Activity 4: Creating a Currency Field in Product object

Duration: 0.05 Hrs

Skill Tags:

To create fields in an object:

1. Go to setup >> click on Object Manager >> type object name(Product) in quick find box >> click on the Product custom object.
2. Now click on **Fields & Relationships**
3. Click on New.
4. Select Data type as **Currency** and click Next.
5. Enter Field Label as **Unit Price**
6. Length - 16, Decimal Places - 2.
7. Select Required Field.
8. Click on Next, Next and Save.

Step 2. Enter the details Step 2 of 4

Field Label 5

Please enter the length of the number and the number of decimal places. For example, a number with a length of 8 and 2 decimal places can accept values up to "12345678.90".

6 Length Number of digits to the left of the decimal point
Decimal Places Number of digits to the right of the decimal point

Field Name 8

Description

Help Text

Required Always require a value in this field in order to save a record 7

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

Activity 5 : Creating Lookup Relationship in Purchase Order Object

Duration: 0.05 Hrs

Skill Tags:

A Lookup relationship is a type of relationship in Salesforce that connects two objects together based on a field known as the Lookup field. It establishes a relationship between a child object and a parent object, allowing the child object to reference the parent object.

To Create a relationship from Purchase Order to Supplier .

- 1.Go to the Setup page >> click on Object manager >> type object name(Purchase Order) in the quick find bar >> click on the Purchase Order object.
- 2.Click on Fields & Relationship
- 3.Click on New.
- 4.Select Lookup relationship as data type and click Next.

5. Select the related object `Supplier`

6. Click on Next.

7. Give Field Label as `Supplier ID`

8. Select Required Field.

9. Click on Next , Next, Next , Save.

The image consists of three vertically stacked screenshots from a Salesforce interface, each with numbered callouts (4, 5, 6, 7, 8, 9) pointing to specific UI elements:

- Screenshot 1 (Top): Data Type Selection**
 - Step 1: "Data Type" section. A red box highlights the "Lookup Relationship" option (radio button selected).
 - Help text: "Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list."
 - Step 2: "Next" button at the top right is highlighted with a red box.
- Screenshot 2 (Middle): Related Object Selection**
 - Step 1: "Purchase Order" object is selected.
 - Step 2: "Choose the related object" section. A red box highlights the "Related To" dropdown, which shows "Supplier".
 - Help text: "Select the other object to which this object is related."
 - Step 2: "Next" button at the top right is highlighted with a red box.
- Screenshot 3 (Bottom): Field Configuration**
 - Step 1: "Field Label" input field contains "Supplier ID".
 - Help text: "Supplier_ID"
 - Step 2: "Field Name" input field contains "Supplier_ID".
 - Help text: "Supplier_ID"
 - Step 3: "Description" and "Help Text" sections are empty.
 - Step 4: "Child Relationship Name" dropdown shows "Purchase_Orders".
 - Help text: "Purchase_Orders"
 - Step 5: "Required" checkbox is checked.
 - Help text: "Always require a value in this field in order to save a record."
 - Step 6: "What to do if the lookup record is deleted?"
 - Clear the value of this field. You can't choose this option if you make this field required.
 - Don't allow deletion of the lookup record that's part of a lookup relationship.
 - Step 7: "Auto add to custom report type" checkbox is checked.
 - Help text: "Add this field to existing custom report types that contain this entity"
 - Step 8: "Next" button at the top right is highlighted with a red box.

Activity 6: Creating a Date Field in Purchase Order object

Duration: 0.05 Hrs

Skill Tags:

To create fields in an object:

1. Go to setup >> click on Object Manager >> type object name(Purchase Order) in quick find box>> click on the Purchase Order object.
2. Now click on **Fields & Relationships** 
3. Click on New.
4. Select Data type as **Date** and click Next.
5. Enter Field Label as **Order Date**  **5**
6. Click on Next, Next and Save.



Step 2. Enter the details

Step 2 of 4

Previous **Next** Cancel

Field Label **5**

Field Name 

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 

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: \$CustomMetadataType__mdt.RecordAPIName__c

Activity 7: Creating a Roll-Up Summary Field in Purchase Order object

Duration: 0.05 Hrs

Skill Tags:

To create fields in an object:

1. Go to setup >> click on Object Manager >> type object name(Purchase Order) in quick find box>> click on the Purchase Order object.
2. Now click on Fields & Relationships
3. Click on New.
4. Select Data type as Roll-Up Summary and click Next.
5. Enter Field Label as Order Count
6. Choose the Summarized Object as Order Items
7. For Select Roll-Up Type select Count
8. Click on Next, Next and Save.

Data Type

Select one of the data types below.

None Selected

Auto Number
A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.

Formula
A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.

Roll-Up Summary 4
A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.

Purchase Order
New Custom Field Help for this Page

Step 2. Enter the details Step 2 of 5

Field Label	Order Count 5
Field Name	Order_Count
Description	<input type="text"/>
Help Text	<input type="text"/>

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

Purchase Order
New Custom Field

Step 3. Define the summary calculation Step 3 of 5

Select Object to Summarize
Master Object Purchase Order
Summarized Object Order Items 6

Required Information

Select Roll-Up Type
 COUNT 7
 SUM
 MIN
 MAX
Field to Aggregate: None

Filter Criteria
 All records should be included in the calculation
 Only records meeting certain criteria should be included in the calculation

Activity 8: Creating a Unit Price Formula Field in Order Item object

Duration: 0.05 Hrs

Skill Tags:

To create fields in an object:

1. Go to setup >> click on Object Manager >> type object name(Order Item) in quick find box >> click on the Order Item object.
2. Now click on Fields & Relationships 
3. Click on New.
4. Select Data type as Formula and click Next.
5. Enter field label Unit Price.
6. Select formula return type Currency, Click Next
7. Create and insert Advance formula: Product_ID__r.Unit_Price__c
8. Click Next, Next, then Save.

Step 2. Choose output type

Field Label **Unit Price** 5

Field Name **Unit_Price** 6

Auto add to custom report type Add this field to existing custom report types that contain this entity 7

Formula Return Type

- None Selected Select one of the data types below.
- Checkbox Calculate a boolean value
Example: `TODAY() > CloseDate`
- Currency** Calculate a dollar or other currency amount and automatically format the field as a currency amount.
Example: `Gross Margin = Amount - Cost_c`
- Date Calculate a date, for example, by adding or subtracting days to other dates.
Example: `Reminder Date = CloseDate - 7`
- Date/Time Calculate a date/time, for example, by adding a number of hours or days to another date/time.
Example: `Next = NOW() + 1`
- Number Calculate a numeric value
Example: `Fahrenheit = 1.8 * Celsius_c + 32`
- Percent Calculate a percent and automatically add the percent sign to the number.

Step 3. Enter formula

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... 8

Simple Formula Advanced Formula

Insert Field 9

Product ID **r**.**Unit_Price_c** 7

Insert Operator 10

Functions

-- All Function Categories --

- ABS
- ACOS
- ADDMONTHS
- AND
- ASCII
- ASIN

Insert Selected Function

Activity 9: Creating a Amount Formula Field in Order Item object

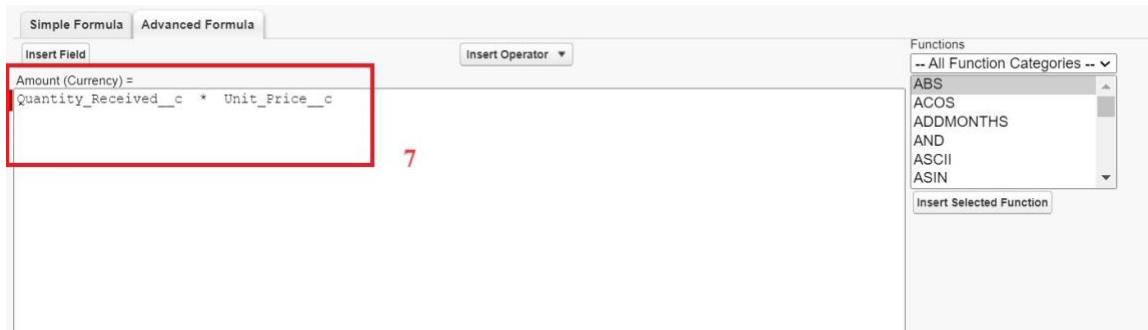
Duration: 0.05 Hrs

Skill Tags:

To create fields in an object:

1. Go to setup >> click on Object Manager >> type object name(Order Item) in quick find box >> click on the Order Item object.
2. Now click on **Fields & Relationships** 11
3. Click on New.

4. Select Data type as **Formula** and click Next.
5. Enter field label **Amount**.
6. Select formula return type **Currency**, Click Next
7. Create and insert Advance formula: **Quantity_Received_c * Unit_Price_c**
8. Click Next, Next, then Save.



Activity 10: Creating a Picklist Field in Inventory Transaction Object

Duration: 0.05 Hrs

Skill Tags:

To create fields in an object:

1. Go to setup >> click on Object Manager >> type object name(Inventory Transaction) in quick find box>> click on the Inventory Transaction Object.
2. Now click on **Fields & Relationships**
3. Click on New.
4. Select Data type as **Picklist** and click Next.
5. Enter Field Label as **Transaction Type**

6. In values select "Enter values, with each value separated by a new line" and enter values as shown below.

Receipt

Issue

Adjustment

7. Click on Next, Next and Save.

Step 2. Enter the details Step 2 of 4

Field Label: Transaction Type 5

Values:

- Use global picklist value set
- Enter values, with each value separated by a new line 6

Receipt
Issue
Adjustment

Field Name: Transaction_Type 7

Description: OneDrive - Personal Online

Activity 11: Creating a Total Order Cost Formula Field in Inventory Transaction object

Duration: 0.05 Hrs

Skill Tags:

To create fields in an object:

1. Go to setup >> click on Object Manager >> type object name(Inventory Transaction) in quick find box >> click on the Order Item object.
2. Now click on **Fields & Relationships**
3. Click on New.
4. Select Data type as **Formula** and click Next.
5. Enter field label **Total Order Cost**.
6. Select formula return type **Currency**, Click Next
7. Create and insert Advance formula: **Purchase_Order_ID__r.Total_Order_Cost__c**
8. Click Next, Next, then Save.

Activity 12: Creating a Phone Field in Supplier object

Duration: 0.05 Hrs

Skill Tags:

To create fields in an object:

1. Go to setup >> click on Object Manager >> type object name(Supplier) in quick find box >> click on the Supplier object.
2. Now click on **Fields & Relationships**
3. Click on New.
4. Select Data type as **Phone** and click Next.
5. Enter the Field Label as **Phone Number**

6. Select Required Field.

7. Click on Next, Next and Save.

Step 2. Enter the details

Field Label: Phone Number 5

Field Name: Phone_Number

Description:

Help Text:

Required Always require a value in this field in order to save a record 6

Auto add to custom report type Add this field to existing custom report types that contain this entity 7

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 (.10), and express date calculations in the standard format (Today() + 7). To reference a field from a Custom Metadata type record use: \$CustomMetadata__mdt__RecordAPIName__Field__c

Activity 13: Creating a Email Field in Supplier object

Duration: 0.05 Hrs

Skill Tags:

To create fields in an object:

1. Go to setup >> click on Object Manager >> type object name(Supplier) in quick find box>> click on the Supplier object.
2. Now click on **Fields & Relationships** ↗
3. Click on New.
4. Select Data type as **Email** ↗ and click Next.
5. Enter the Field Label as **Email** ↗
6. Click on Next, Next and Save.

Step 2. Enter the details Step 2 of 4

Field Label 5

Field Name 6

Description

Help Text

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

Unique Do not allow duplicate values

External ID Set this field as the unique record identifier from an external system

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

Milestone 6 -Editing of Page Layouts

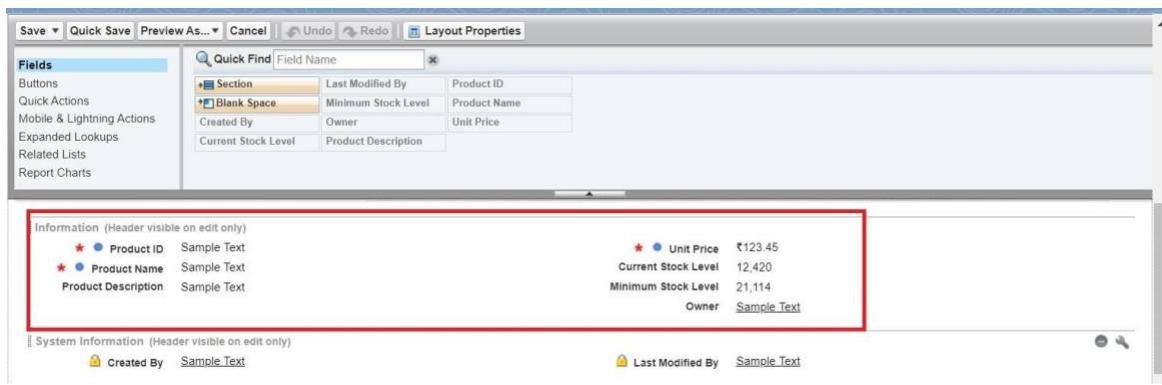
Page layouts in Salesforce are used to customize the organization, structure, and content of pages for viewing and editing records. They determine which fields, related lists, and custom links are visible to users, as well as the order and grouping of those elements.

Activity 1: To edit a Page Layout in Product Object

Duration: 0.05 Hrs

Skill Tags:

1. Go to setup >> click on Object Manager >> type object name(Product) in quick find box >> click on the Product object >> Page Layouts .
2. Click on the Product Layout.
3. Drag and Arrange the field as shown below.



4. Click on Save.

Activity 2: To edit a Page Layout in Purchase Order Object

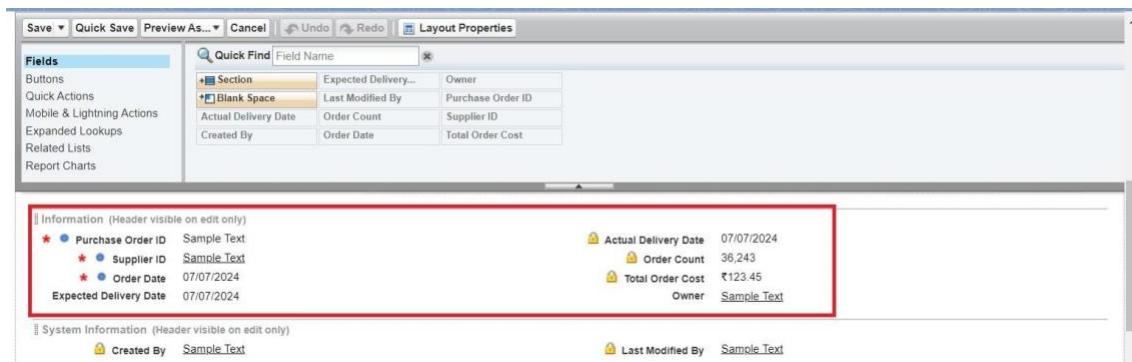
Duration: 0.05 Hrs

Skill Tags:

1. Go to setup >> click on Object Manager >> type object name(Purchase Order) in quick find box >> click on the Purchase Order object >> Page Layouts.

2. Click on the Purchase Order Layout

3. Drag and Arrange the field as shown below



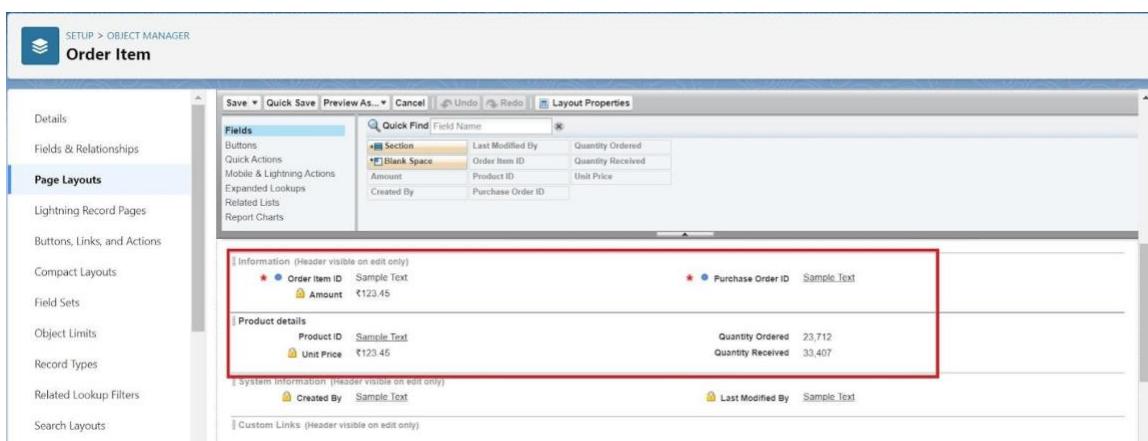
4. Click on field Order Date >> click on settings >> select Required and save it.
5. Click on field Total Order Cost >> click on settings >> select Read Only and save it.
6. Click Save.

Activity 3: To edit a Page Layout in Order Item Object

Duration: 0.05 Hrs

Skill Tags:

1. Go to setup >> click on Object Manager >> type object name(Order Item) in quick find box >> click on the Order Item object >> Page Layouts.
2. Click on the Order Item Layout
3. Drag and Arrange the field as shown below



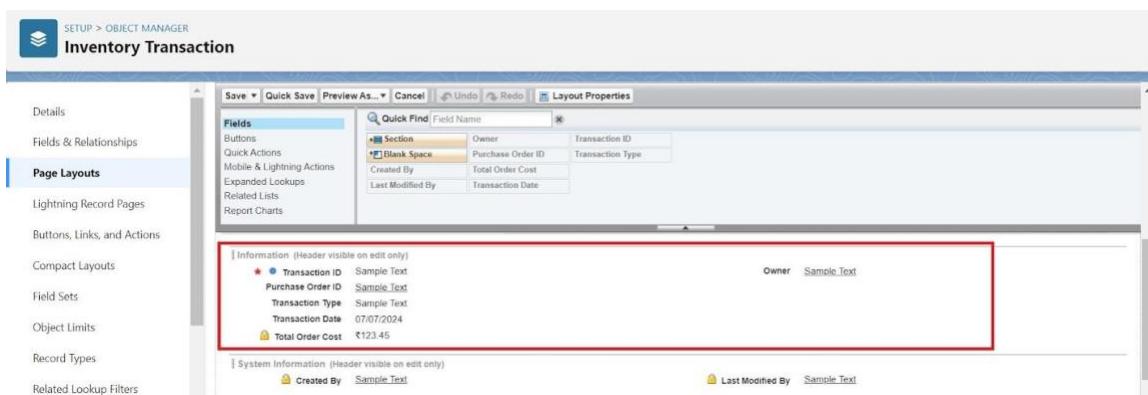
4. Click Save.

Activity 4: To edit a Page Layout in Inventory Transaction Object

Duration: 0.05 Hrs

Skill Tags:

- 1. Go to setup >> click on Object Manager >> type object name(Inventory Transaction) in quick find box >> click on the Inventory Transaction object >> Page Layouts.**
- 2. Click on the Inventory Transaction Layout**
- 3. Drag and Arrange the field as shown below**



- 4. Click Save.**

Activity 5: To edit a Page Layout in Supplier Object

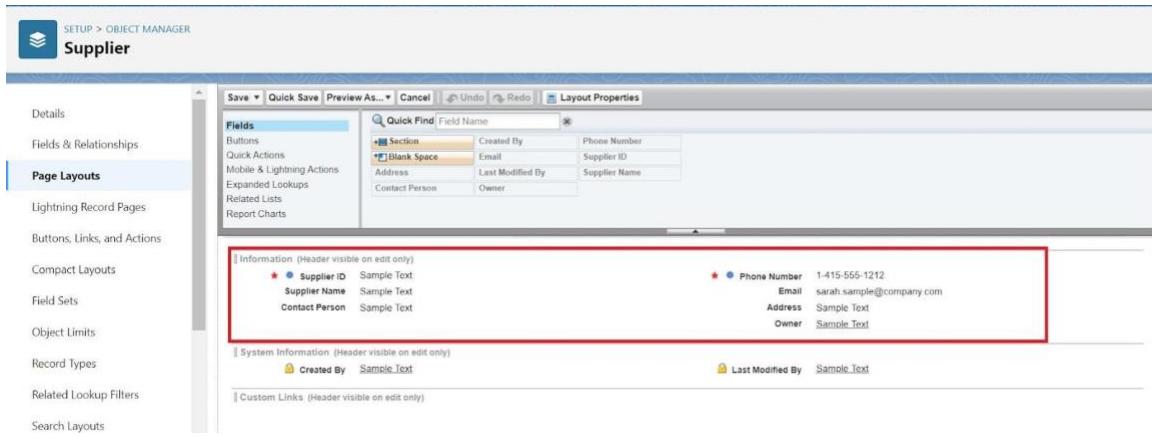
Duration: 0.05 Hrs

Skill Tags:

1. Go to setup >> click on Object Manager >> type object name(Supplier) in quick find box >> click on the Supplier object >> Page Layouts.

2. Click on the Supplier Layout

3. Drag and Arrange the field as shown below



4. Click Save.

Milestone 6 -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.

Activity 1: To create a Compact Layout to a Product Object

Duration: 0.05 Hrs

Skill Tags:

- 1. Go to setup >> click on Object Manager >> type object name(Product) in quick find box >> click on the Product object**
- 2. Click on Compact Layouts in the sidebar .**
- 3. Click on New.**
- 4. Enter the Label as Product Compact Layout .**
- 5. Select the Compact Layout Fields : Select Product name, Unit Price, Current Stock Level.**
- 6. Click Save.**
- 7. Click Compact Layout Assignment.**
- 8. Click Edit Assignment.**
- 9. Choose "Product Compact Layout" from the dropdown.**
- 10. Click Save.**

The screenshot shows the Salesforce Object Manager for the 'Product' object. The left sidebar has a 'Compact Layouts' link highlighted with a red box and the number '2'. The main content area displays a table titled 'Compact Layouts' with one item: 'System Default' (API Name: SYSTEM). The top right of the page includes a 'New' button, a 'Quick Find' search bar, and a 'Compact Layout Assignment' link. The status bar at the bottom indicates 'LAST MODIFIED'.

LABEL	API NAME	PRIMARY	MODIFIED BY	LAST MODIFIED
System Default	SYSTEM	✓		

Enter Compact Layout Information

Label: Product Compact Layout 4

Name: Product_Compact_Layout 4

Select Compact Layout Fields

Available Fields	Selected Fields
Created By Last Modified By Minimum Stock Level Owner Product ID	Product Name Unit Price Current Stock Level

Add 5 Remove

Top Up ▲ Down ▼ Bottom

Use SHIFT + click to select adjacent fields. Use CTRL + click to select an assortment of fields.

6 Save Cancel

Product Compact Layouts Compact Layout Assignment

Primary Compact Layout

Select the compact layout to use when this object's records appear as list items in the mobile app.

Primary Compact Layout: Product Compact Layout 9

10 Save Cancel

Activity 2: To create a Compact Layout to a Purchase Order Object

Duration: 0.05 Hrs

Skill Tags:

1. Go to setup >> click on Object Manager >> type object name(Purchase Order) in quick find box >> click on the Purchase Order object
2. Click on Compact Layouts in the sidebar .
3. Click on New.
4. Enter the Label as Purchase Order Compact Layout 11

5. Select the Compact Layout Fields : Select Purchase Order ID, Order Date, Total Order Cost, Supplier ID.

6. Click Save.

7. Click Compact Layout Assignment.

8. Click Edit Assignment.

9. Choose "Purchase Order Compact Layout" from the dropdown.

10. Click Save.

Compact Layout Edit

Enter Compact Layout Information

Label: Purchase Order Compact L **4**

Name: Purchase_Order_Compact

Select Compact Layout Fields

Available Fields: Actual Delivery Date, Created By, Expected Delivery Date, Last Modified By, Owner, Order Count

Selected Fields: Purchase Order ID, Order Date, Total Order Cost, Supplier ID **5**

Add, Remove, Top, Up, Down, Bottom

Use SHIFT + click to select adjacent fields. Use CTRL + click to select an assortment of fields.

6 Save Cancel

Purchase Order Compact Layouts Compact Layout Assignment

Primary Compact Layout **10**

Select the compact layout to use when this object's records appear as list items in the mobile app.

Primary Compact Layout: Purchase Order Compact Layout **9**

Save Cancel

Milestone 8 - 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.

Activity 1: To create an Expected Delivery Date Validation rule to a Employee Object

Duration: 0.05 Hrs

Skill Tags:

1. Go to setup >> click on Object Manager >> type object name(Purchase Order) in quick find box>> click on the Purchase Order object
2. Click on the validation rule >> click on New.
3. Enter the Rule name as **Expected Delivery Date Validation .**
4. Select Active
5. Insert the Error Condition Formula as :(Expected_Delivery_Date__c - Order_Date__c)> 7

Purchase Order Validation Rule

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: Expected_Delivery_Date_Validation 3

Active:

Description: 4

Error Condition Formula

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 5

(Expected_Delivery_Date_c - Order_Date_c) > 7

Functions

-- All Function Categories --

ABS
ACOS
ADDMONTHS
AND
ASCII
ASIN

I = Required Information

6. Enter the Error Message as The Expected Delivery Date should not exceed 7 days. 6

7. Select the Error location as Top of Page

8. Click Save.

Error Message

Example: Discount percent cannot exceed 30%

This message will appear when Error Condition formula is true

Error Message: The Expected Delivery Date should not exceed 7 days. 6

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 7

8 Save Save & New Cancel

Milestone 9 - Profiles

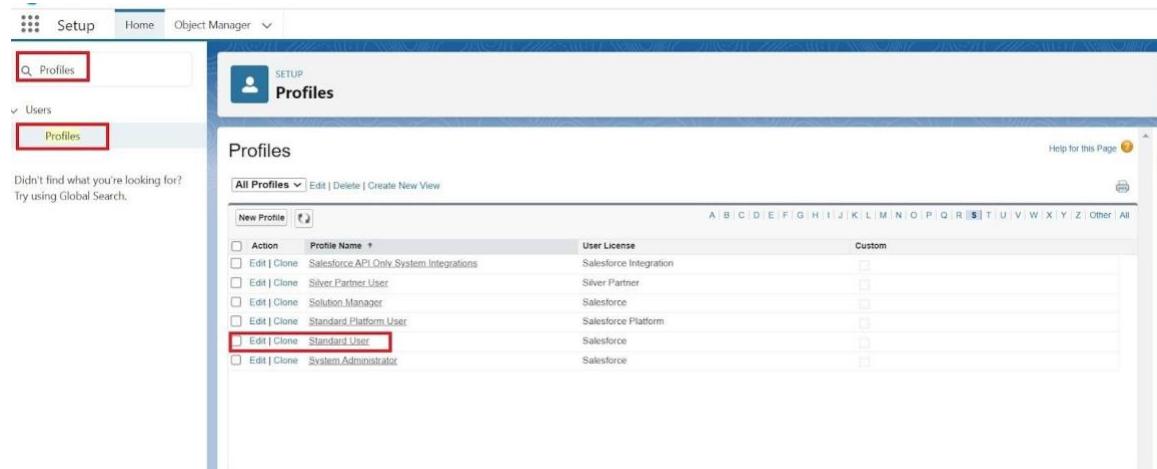
Profiles in Salesforce are fundamental to the platform's security model, defining what users can do within the organization. Profiles control a user's permissions to objects, fields, tabs, apps, and other settings. Each user in Salesforce must be assigned a profile, and the profile assigned to a user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

Activity 1: To create an Inventory Manager Profile

Duration: 0.1 Hrs

Skill Tags:

1. Go to setup >> type profiles in quick find box >> click on profiles >> clone the desired profile (Standard User) >> enter profile name (Inventory Manager) >> Save.

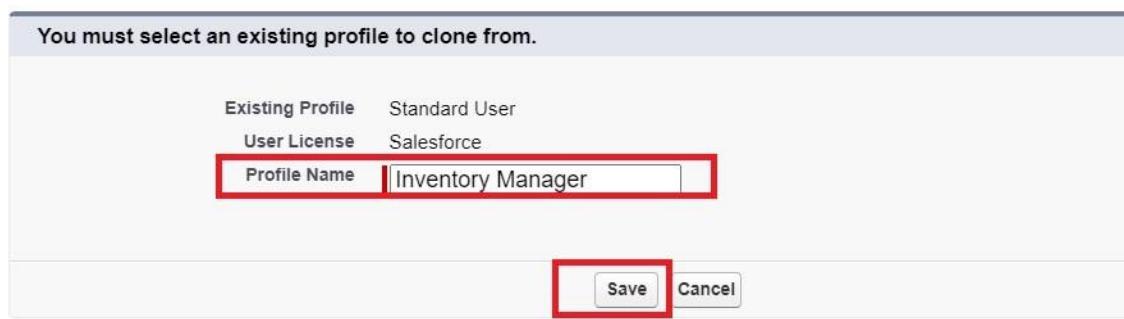


The screenshot shows the Salesforce Setup interface under the Profiles section. A search bar at the top left contains the text 'Profiles'. Below it, a sidebar has 'Users' expanded, with 'Profiles' selected and highlighted by a red box. The main area displays a table of profiles. One row for 'Standard User' is selected, indicated by a red box around the entire row. The 'Edit | Clone' button in that row is also highlighted with a red box. The table includes columns for Action, Profile Name, User License, and Custom.

Action	Profile Name	User License	Custom
<input type="checkbox"/> Edit Clone	Salesforce API Only System Integrations	Salesforce Integration	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Silver Partner User	Silver Partner	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Solution Manager	Salesforce	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Standard Platform User	Salesforce Platform	<input type="checkbox"/>
<input checked="" type="checkbox"/> Edit Clone	Standard User	Salesforce	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	System Administrator	Salesforce	<input type="checkbox"/>

Clone Profile

Enter the name of the new profile.



You must select an existing profile to clone from.

Existing Profile: Standard User
User License: Salesforce
Profile Name:

2. While still on the profile page, then click Edit.

3. Select the Custom App settings as default for the Medical Inventory Management.

Custom App Settings					
Visible	Default	Visible	Default		
All Tabs (standard__AllTabSet)	<input checked="" type="checkbox"/>	<input type="radio"/>	Sales (standard__Lightning_Sales)	<input checked="" type="checkbox"/>	<input type="radio"/>
Analytics Studio (standard__Insights)	<input checked="" type="checkbox"/>	<input type="radio"/>	Sales (standard__Sales)	<input checked="" type="checkbox"/>	<input type="radio"/>
App Launcher (standard__AppLauncher)	<input checked="" type="checkbox"/>	<input type="radio"/>	Sales Console (standard__LightningSalesConsole)	<input checked="" type="checkbox"/>	<input type="radio"/>
Bolt Solutions (standard__LightningBolt)	<input checked="" type="checkbox"/>	<input type="radio"/>	Salesforce Chatter (standard__Chatter)	<input checked="" type="checkbox"/>	<input type="radio"/>
Community (standard__Community)	<input checked="" type="checkbox"/>	<input type="radio"/>	Salesforce Scheduler Setup (standard__LightningScheduler)	<input type="checkbox"/>	<input type="radio"/>
Content (standard__Content)	<input checked="" type="checkbox"/>	<input type="radio"/>	Sample Console (standard__ServiceConsole)	<input type="checkbox"/>	<input type="radio"/>
Data Manager (standard__DataManager)	<input checked="" type="checkbox"/>	<input type="radio"/>	Service (standard__Service)	<input checked="" type="checkbox"/>	<input type="radio"/>
Digital Experiences (standard__SalesforceCMS)	<input checked="" type="checkbox"/>	<input type="radio"/>	Service Console (standard__LightningService)	<input checked="" type="checkbox"/>	<input type="radio"/>
Lightning Usage App (standard__LightningInstrumentation)	<input checked="" type="checkbox"/>	<input type="radio"/>	Site.com (standard__Sites)	<input checked="" type="checkbox"/>	<input type="radio"/>
Marketing CRM Classic (standard__Marketing)	<input checked="" type="checkbox"/>	<input type="radio"/>	Subscription Management (standard__RevenueCloudConsole)	<input checked="" type="checkbox"/>	<input type="radio"/>
Medical Inventory Management (Medical_Inventory_Management)	<input type="checkbox"/>	<input checked="" type="radio"/>	WDC (standard__Work)	<input checked="" type="checkbox"/>	<input type="radio"/>
Queue Management (standard__QueueManagement)	<input checked="" type="checkbox"/>	<input type="radio"/>			

4. Scroll down to Custom Object Permissions and Give access permissions as mentioned in the below diagram.

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

5. Change the password policies as mentioned :

6. User passwords expire in should be `Never expires`

7. Minimum password length should be `8` , and click save.

Password Policies

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
Obscure secret answer for password resets	<input type="checkbox"/>
Require a minimum 1 day password lifetime	<input type="checkbox"/>
Don't immediately expire links in forgot password emails	<input type="checkbox"/> 

Buttons: Save (highlighted), Save & New, Cancel

Activity 2: To create an Purchase Manager Profile

Duration: 0.1 Hrs

Skill Tags:

1. Go to setup >> type profiles in quick find box >> click on profiles >> clone the desired profile (Standard User) >> enter profile name (Purchase Manager) >> Save.
2. While still on the profile page, then click Edit.
3. Select the Custom App settings as default for the Medical Inventory Management.

SETUP Profiles

Profiles

Set the permissions and page layouts for this profile.

Profile Edit

Name: Purchase Manager

User License: Salesforce

Description:

Custom Profile ✓

Custom App Settings

	Visible	Default		Visible	Default
All Tabs (standard__AllTabSet)	<input checked="" type="checkbox"/>	<input type="radio"/>	Sales (standard__LightningSales)	<input checked="" type="checkbox"/>	<input type="radio"/>
Analytics Studio (standard__Insights)	<input checked="" type="checkbox"/>	<input type="radio"/>	Sales (standard__Sales)	<input checked="" type="checkbox"/>	<input type="radio"/>
App Launcher (standard__AppLauncher)	<input checked="" type="checkbox"/>	<input type="radio"/>	Sales Console (standard__LightningSalesConsole)	<input checked="" type="checkbox"/>	<input type="radio"/>
Bolt Solutions (standard__LightningBolt)	<input checked="" type="checkbox"/>	<input type="radio"/>	Salesforce Chatter (standard__Chatter)	<input checked="" type="checkbox"/>	<input type="radio"/>
Community (standard__Community)	<input checked="" type="checkbox"/>	<input type="radio"/>	Salesforce Scheduler Setup (standard__LightningScheduler)	<input type="checkbox"/>	<input type="radio"/>
Content (standard__Content)	<input checked="" type="checkbox"/>	<input type="radio"/>	Sample Console (standard__ServiceConsole)	<input type="checkbox"/>	<input type="radio"/>
Data Manager (standard__DataManager)	<input checked="" type="checkbox"/>	<input type="radio"/>	Service (standard__Service)	<input checked="" type="checkbox"/>	<input type="radio"/>
Digital Experiences (standard__SalesforceCMS)	<input checked="" type="checkbox"/>	<input type="radio"/>	Site.com (standard__Sites)	<input checked="" type="checkbox"/>	<input type="radio"/>
Lightning Usage App (standard__LightningInstrumentation)	<input checked="" type="checkbox"/>	<input type="radio"/>	Subscription Management (standard__RevenueCloudConsole)	<input checked="" type="checkbox"/>	<input type="radio"/>
Marketing CRM Classic (standard__Marketing)	<input checked="" type="checkbox"/>	<input type="radio"/>	WDC (standard__Work)	<input checked="" type="checkbox"/>	<input type="radio"/>
Medical Inventory Management (Medical_Inventory_Management)	<input type="checkbox"/>	<input checked="" type="radio"/>			
Quorum Management (standard__QuorumManagement)	<input checked="" type="checkbox"/>	<input type="radio"/>			

4. scroll down to Custom Object Permissions and Give access permissions as mentioned in the below diagram.

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

5. Change the password policies as mentioned :

6. User passwords expire in should be "never expires"

7. Minimum password length should be "8", and click save.

Password Policies

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
Obscure secret answer for password resets	<input type="checkbox"/>
Require a minimum 1 day password lifetime	<input type="checkbox"/>
Don't immediately expire links in forgot password emails	<input type="checkbox"/> i

Save **Save & New** **Cancel**

Milestone 10 - Roles

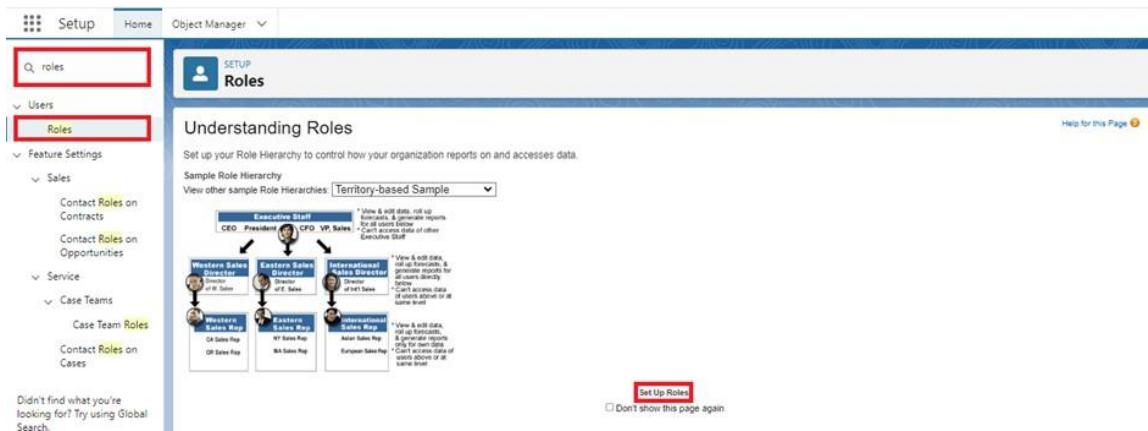
Roles in Salesforce are used to control record-level access and define the hierarchy of an organization, determining the level of visibility and sharing of records among users. Roles work in conjunction with profiles to provide a robust security model. While profiles control what actions users can perform (object and field permissions), roles control which records users can see based on their position in the hierarchy.

Activity 1 : Create a Purchasing Manager Role.

Duration: 0.05 Hrs

Skill Tags:

1. Go to quick find >> Search for Roles >> click on Set Up Roles.



2. Click on Expand All and click on add role under SVP, Sales & Marketing role.
3. Give Label as Purchasing Manager and Role name gets auto populated. Then click on Save.

SETUP

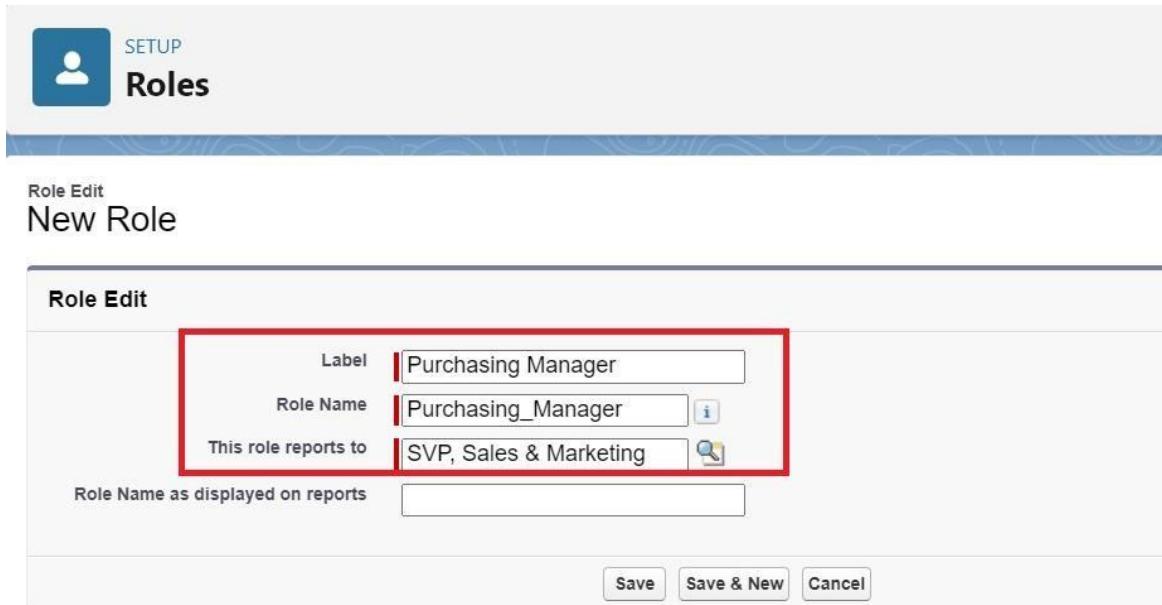
Roles

Role Edit
New Role

Role Edit

Label	Purchasing Manager
Role Name	Purchasing_Manager 
This role reports to	SVP, Sales & Marketing 
Role Name as displayed on reports	<input type="text"/>

Save Save & New Cancel



Activity 2 : Create a Purchasing Manager Role.

Duration: 0.05 Hrs

Skill Tags:

1. Go to quick find >> Search for Roles >> click on Set Up Roles.

Setup Home Object Manager

Q. roles

Users Roles

Feature Settings

Sales Contact Roles on Contracts Contact Roles on Opportunities

Service Case Teams Case Team Roles Contact Roles on Cases

Didn't find what you're looking for? Try using Global Search.

SETUP Roles

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

* View & edit data, run up-to-date reports & generate reports for territories * Can't access data of other Executive Staff

* View & edit data, run up-to-date reports & generate reports for territories * Can't access data of other Sales Director

* View & edit data, run up-to-date reports & generate reports for territories * Can't access data of users above or at same level

Set Up Roles Don't show this page again

2. Click on Expand All and click on add role under SVP, Sales & Marketing role.
3. Give Label as **Inventory Manager** and the Role name gets auto populated. Then click on Save.

SETUP Roles

Role Edit New Role

Role Edit

Label	Inventory Manager
Role Name	Inventory_Manager
This role reports to	SVP, Sales & Marketing
Role Name as displayed on reports	

Save **Save & New** **Cancel**

Milestone 12 - Permission Sets

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.

Activity 1 : Create a Permission Set.

Duration: 0.1 Hrs

Skill Tags:

- 1. Go to setup >> type Permission in quick find box >> Select Permission Set >> click on New.**

Action	Permission Set Label	Description	License
<input type="checkbox"/>	Buyer	Allows access to the store. Lets users see products and categories, make...	B2B Buyer Permission Set One Seat
<input type="checkbox"/>	Buyer Manager	Includes all Buyer capabilities, and allows access to manage carts and or...	B2B Buyer Manager Permission Set One Seat
<input type="checkbox"/>	C360 High Scale Flow Integration User	Allows integration user to access features specific to C360 High Scale Flow.	Cloud Integration User
<input type="checkbox"/>	CRM User	Denotes that the user is a Sales Cloud or Service Cloud user.	CRM User
<input type="checkbox"/>	Commerce Admin	Allow access to commerce admin features.	Commerce Admin Permission Set License Seat
<input type="checkbox"/>	Contact Center Admin	Manage Service Cloud Voice contact centers that use Amazon Connect a...	Service Cloud Voice User
<input type="checkbox"/>	Contact Center Admin (Partner Telephony)	Manage Service Cloud Voice contact centers that use your preferred tele...	Service Cloud Voice User (Partner Telephony)
<input type="checkbox"/>	Contact Center Agent	Access agent features in Service Cloud Voice contact centers that use A...	Service Cloud Voice User
<input type="checkbox"/>	Contact Center Agent (Partner Telephony)	Access agent features in Service Cloud Voice contact centers that use yo...	Service Cloud Voice User (Partner Telephony)
<input type="checkbox"/>	Contact Center Supervisor	Access supervisor features in Service Cloud Voice contact centers that u...	Service Cloud Voice User
<input type="checkbox"/>	Contact Center Supervisor (Partner Telephony)	Access supervisor features in Service Cloud Voice contact centers that us...	Service Cloud Voice User (Partner Telephony)
<input type="checkbox"/>	Data Cloud Home Org Integration User	Allows integration user to access entities specific to Remote Data Cloud	Cloud Integration User
<input type="checkbox"/>	DeliveryEstimationServicePermSet		Cloud Integration User
<input type="checkbox"/>	DeliveryEstimationServicePermSet		Salesforce
<input type="checkbox"/>	Experience Profile Manager		

- 2. Enter Label as Purchase Manager Create Access >> Click on Save.**

Permission Set
Create

Enter permission set information

Label	Purchase Manager Create Access
API Name	Purchase_Manager
Description	
Session Activation Required	<input type="checkbox"/>

Save Cancel

3. From Object Settings >> Select Order Item >> Enable for both Tab Available and Visible >> Enable Read and Create in Object Permissions >> Click on Save.

SETUP
Permission Sets

Permission Set
Purchase Manager Create Access

Find Settings... | Clone | Delete | Edit Properties | Manage Assignments | View Summary

Permission Set Overview > Object Settings Order Items

Order Items

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

Tab Settings

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	<input type="checkbox"/>
Modify All	<input type="checkbox"/>

Save Cancel

4. Navigate to the Permission Set detail page >> Click Manage Assignments >> Click Add Assignments >> Select the user John PurchaseM to assign the permission set to and click Next.

... > PERMISSION SET 'PURCHASE MANAGER CREATE ACCESS' > MANAGE ASSIGNMENT EXPIRATION

Purchase Manager Create Access

Select Users to Assign

Active Users

Full Name	Alias	Username	Role	Active	Profile
Annapurna Gurram	AGurr	medicalinventory@sb.com	System Administrator	<input checked="" type="checkbox"/>	
Chatter Expert	Chatter	chatty.00dd0000058bqlua.yrgohck7wvo@chatter.salesforce.com	Chatter Free User	<input checked="" type="checkbox"/>	
Integration User	integ	integration@00dd0000058bqlua.com	Analytics Cloud Integration User	<input checked="" type="checkbox"/>	
John PurchaseM	jpurc	john@purchasem.com	Purchasing Manager	<input checked="" type="checkbox"/>	Purchase Manager
Security User	sec	insightssecurity@00dd0000058bqlua.com	Analytics Cloud Security User	<input checked="" type="checkbox"/>	

5. Select No Expiration date >> Click on Assign.

... > PERMISSION SET 'PURCHASE MANAGER CREATE ACCESS' > MANAGE ASSIGNMENT EXPIRATION

Purchase Manager Create Access

Select an Expiration Option For Assigned Users

No expiration date

Specify the expiration date

1 Day	1 Week	30 Days	60 Days	Custom Date
-------	--------	---------	---------	-------------

Select a time zone...

Selected Users

Full Name	Role	Profile	Active	User License	Expires On
John PurchaseM	Purchasing Manager	Purchase Manager	<input checked="" type="checkbox"/>	Salesforce	Never Expires

Milestone 13 - Flows

Flows in Salesforce, part of the Lightning Flow product, are powerful automation tools that help you collect data and perform actions in your Salesforce environment. Flows

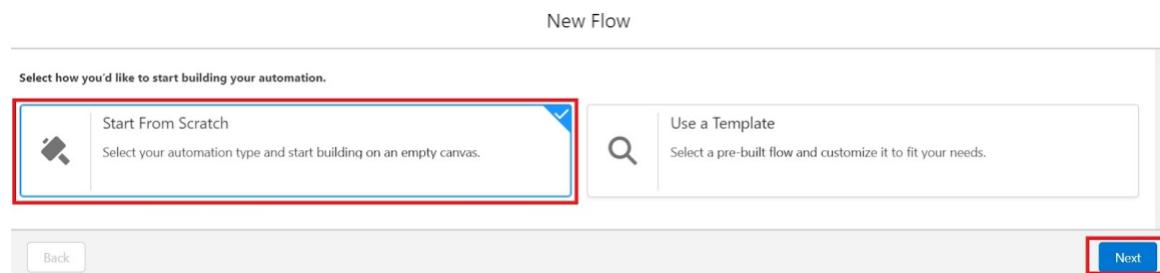
can be used to automate business processes, guide users through tasks, and integrate with external systems. They are highly versatile and can be configured to meet a wide range of business requirements without the need for custom code.

Activity 1 : Create Flow to update the Actual Delivery Date.

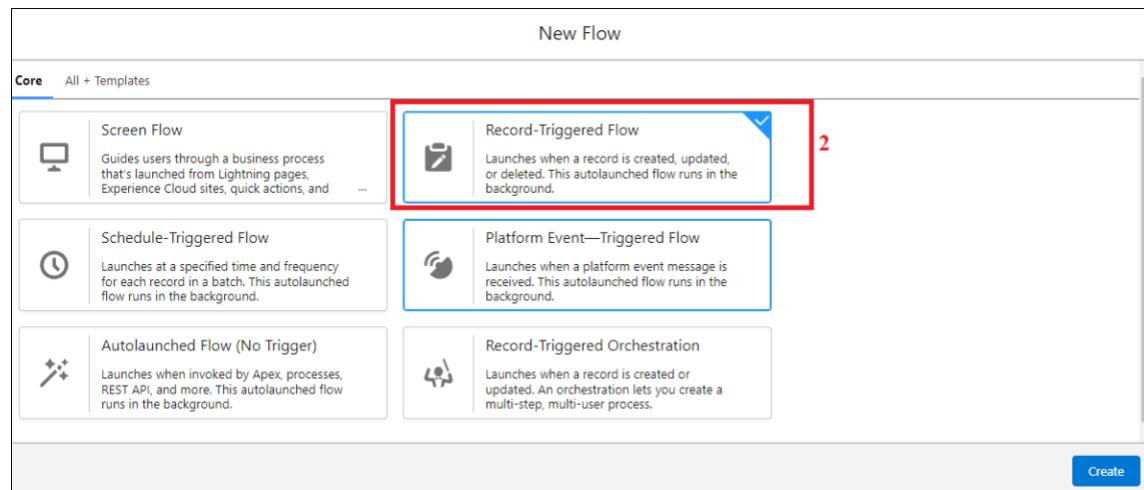
Duration: 0.2 Hrs

Skill Tags:

1. Go to setup >> type Flow in quick find box >> Click on the Flow and Select the New Flow >> Start From Scratch .



2. Select the record Triggered flow.Click on create.



3. Under Object select Purchase Order 3

4. Select A record is created or updated

The screenshot shows the 'Configure Start' interface. In the 'Select Object' section, the input field contains 'Purchase Order' with a red box around it and the number '3' to its right. Below this, the 'Configure Trigger' section shows the 'Trigger the Flow When:' dropdown with the option 'A record is created or updated' selected, also highlighted with a red box and the number '4'.

5. Set Entry Conditions : None

6. Select Fast Field Updates and click on Done

The screenshot shows the 'Set Entry Conditions' screen. The 'Condition Requirements' dropdown is set to 'None' with a red box around it and the number '5' to its right. Below this, the 'Optimize the Flow for:' section contains two options: 'Fast Field Updates' (selected) and 'Actions and Related Records'. The 'Fast Field Updates' box is highlighted with a red border and the number '6' to its left. The 'Actions and Related Records' box contains the text: 'Update any record and perform actions, like send an email. This more flexible flow runs after the record is saved to the database.'

7. Under the record trigger flow click on the + icon and select Get Records.

8. Enter Label as Get Purchase Record

9. For Object select Purchase Order.

10. For Condition Requirements , select All Conditions are Met(AND)

For the first condition select as follows:

Field: Id

Operator: Equals

Value: {!\$Record.Id}

Get Records

* Label: Get Purchase Record **8**

* API Name: Get_Purchase_Record

Description:

Get Records of This Object

* Object: Purchase Order **9**

Filter Purchase Order Records **10**

Condition Requirements: All Conditions Are Met (AND)

Field: Id, Operator: Equals, Value: **A_a \$Record > Record ID X**

+ Add Condition

11. For How many Records to store Select Only the First Record.

**12. For How to Store Record Data select Choose fields and let Salesforce do the rest.
Select Field: Order_Date__c. Click on Done.**

How Many Records to Store

Only the first record

All records

How to Store Record Data

Automatically store all fields

Choose fields and let Salesforce do the rest

Choose fields and assign variables (advanced)

Select Purchase Order Fields to Store in Variable

Field

ID

Field

Order_Date_c

+ Add Field



13. In the Flow Builder, click on the Manager tab on the left-hand side >> Click on New Resource >> In the Resource Type dropdown, select Variable.

14. Enter API name as ActualDeliveryDate >> Select Data type as Date >> Click on Done.

15. From the Toolbox drag and drop Assignment element.

16. Enter the label as Assignment.

17. Set Variable Values:

a) **Variable : {!ActualDeliveryDate}**

Operator : Equals

Value : {!\$Record.Order_Date_c}

b) **Variable : {!ActualDeliveryDate}**

Operator : Add

Value : 3

Assignment

* Label	* API Name
Assignment	Assignment_1
Description	

Set Variable Values

Each variable is modified by the operator and value combination.

Variable	Operator	Value
ActualDeliveryDate	Equals	\$Record > Order Date
ActualDeliveryDate	Add	3
+ Add Assignment		

18.Click Done

19. From the Toolbox drag and drop Update Records element and connect to the Assignment element.

20. Enter the label as Updating Purchasing Order ↴

21.How to Find Records to Update and Set Their Values : Use the Purchase Order record that triggered the flow

22. Set Filter Conditions : None -Always Update Record

23. Set Field Values for the Trip Record as

Field : Actual_Delivery_Date_c

Value : {!ActualDeliveryDate}

The screenshot shows the 'Update Records' configuration screen. At the top, there's a title bar with a 'Update Records' icon and a close button ('X'). Below the title, a section titled '* How to Find Records to Update and Set Their Values' contains a list of options:

- Use the purchase order record that triggered the flow
- Update records related to the purchase order record that triggered the flow
- Use the IDs and all field values from a record or record collection
- Specify conditions to identify records, and set fields individually

A note below the list states: "Because this flow runs *before* a record is saved, you can only update the record that triggered the flow to run. To update other records, configure the trigger to run the flow *after* the record is saved." A red box highlights the first option in the list.

Below this section, there's a 'Set Filter Conditions' section with a dropdown menu labeled 'Condition Requirements to Update Record' containing 'None—Always Update Record'. A red box highlights this dropdown.

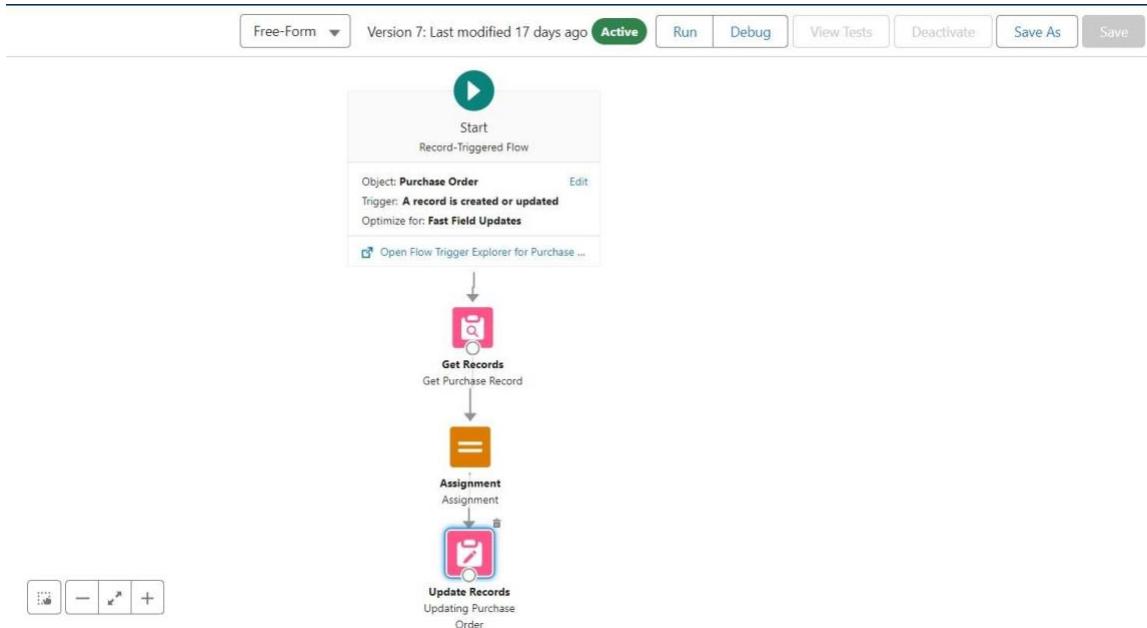
Under 'Set Field Values for the Purchase Order Record', there's a table with one row. The 'Field' column contains 'Actual_Delivery_Date_c' and the 'Value' column contains 'ActualDeliveryDate'. A red box highlights this row.

At the bottom left of this section is a button labeled '+ Add Field'.

24. Click Done

25. Save the flow as Actual Delivery Date Updating

26. Activate the flow.



Milestone 14 - Triggers

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. They are powerful tools for automating complex business logic and ensuring data integrity by enforcing custom validation rules and workflows that cannot be achieved through declarative tools alone.

Activity 1 : Create a Trigger to Calculate total amount on Order Item.

Duration: 0.2 Hrs

Skill Tags:

Step 1 : Login to Salesforce:

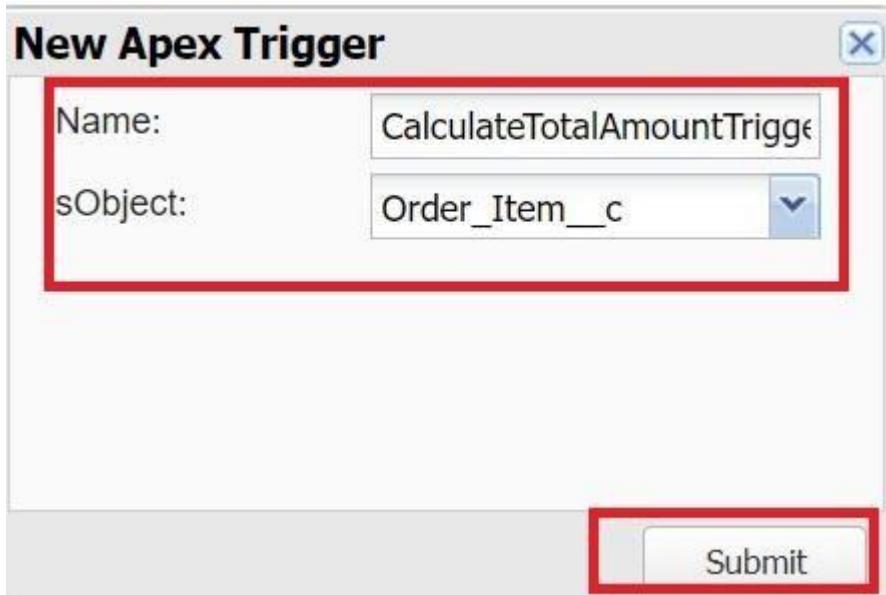
Log in to your Salesforce account with administrative privileges.

Step 2:

- i) **Navigate to Setup:** Once logged in, click on the gear icon ?? (Setup) located at the top-right corner of the page. This will open the Setup menu.
- ii) **Click on Developer Console:** Click on the "Developer Console" option from the Setup menu. This will open the Developer Console in a new browser tab or window.

Step 3:

- i) **In the Developer Console window, go to the top menu and click on "File".**
- ii) **Select New:** From the dropdown menu under "File", select "New".
- iii) **Choose Apex Trigger:** This will open a new Apex Trigger editor tab.



Create an Apex Trigger:

```
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);
```

```
}
```

Step 4:

- i) In the Developer Console window, go to the top menu and click on "File".
- ii) Select New: From the dropdown menu under "File", select "New".
- iii) Choose Apex Class: Name it as CalculateTotalAmountHandler

```
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>();  
  
        // For insert, update, and undelete scenarios  
  
        if (isInsert || isUpdate || isUndelete) {  
  
            for (Order_Item_c ordItem : newItems) {  
  
                parentIds.add(ordItem.Purchase_Order_Id_c);  
  
            }  
        }  
    }  
}
```

```
// For update and delete scenarios

if (isUpdate || isDelete) {

    for (Order_Item__c ordItem : oldItems) {

        parentIds.add(ordItem.Purchase_Order_Id__c);

    }
}

// Calculate the total amounts for affected Purchase Orders

Map<Id, Decimal> purchaseToUpdateMap = new Map<Id, Decimal>();

if (!parentIds.isEmpty()) {

    // Perform an aggregate query to sum the Amount__c for each Purchase Order

    List<AggregateResult> aggrList = [
        SELECT Purchase_Order_Id__c, SUM(Amount__c) totalAmount
    ];
}
```

```
FROM Order_Item__c

WHERE Purchase_Order_Id__c IN :parentIds

GROUP BY Purchase_Order_Id__c

];

// Map the result to Purchase Order IDs

for (AggregateResult aggr : aggrList) {

    Id purchaseOrderId = (Id)aggr.get('Purchase_Order_Id__c');

    Decimal totalAmount = (Decimal)aggr.get('totalAmount');

    purchaseToUpdateMap.put(purchaseOrderId, totalAmount);

}

// Prepare Purchase Order records for update
```

```
List<Purchase_Order_c> purchaseToUpdate = new List<Purchase_Order_c>();

for (Id purchaseOrderId : purchaseToUpdateMap.keySet()) {

    Purchase_Order_c purchaseOrder = new Purchase_Order_c(Id =
purchaseOrderId, Total_Order_cost_c = purchaseToUpdateMap.get(purchaseOrderId));

    purchaseToUpdate.add(purchaseOrder);

}

// Update Purchase Orders if there are any changes

if (!purchaseToUpdate.isEmpty()) {

    update purchaseToUpdate;

}

}

}
```

Save it.

Milestone 15 - Reports

Reports in Salesforce provide a powerful way to visualize and analyze data stored in your Salesforce organization. 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.

Activity 1: Create a Purchase Orders based on Suppliers(Summary) Report

Duration: 0.1 Hrs

Skill Tags:

1. Click App Launcher
2. Select Medical Inventory Management App

3. Click on Reports tab

4. Click on New Report.

5. Click the report type as Purchase Orders Click Start report.

The screenshot shows the 'Create Report' interface. On the left, there's a sidebar with categories like 'Recently Used', 'All', 'Accounts & Contacts', 'Opportunities', etc. The main area has a search bar 'Select a Report Type' with 'Purchase' typed in. Below it, a list of 'Report Type Name' and 'Category' is shown, with 'Purchase Orders' selected. To the right, a 'Details' panel for 'Purchase Orders' is open, showing its status as a 'Standard Report Type'. A red box highlights the 'Start Report' button, which is also highlighted in blue. Other sections in the details panel include 'Created By You' and 'Created By Others'.

6. Click on Filters and select as follows and click on Apply

The screenshot shows the 'Filters' section. It has a header 'Filters' with a dropdown arrow. Below it is a search bar with 'Add filter...' and a magnifying glass icon. Two filter rows are listed: 'Show Me All purchase orders' and 'Actual Delivery Date All Time'. The first row is highlighted with a red border.

7. Customize your 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).

8. Click save and run

9. Give report name –Purchase Orders based on Suppliers.

10. Click Save

**NOTE: In this report you can see your all record of the object you selected for reporting
(What you selects in \$Select a report type option)**

The screenshot shows a report titled "Purchase Orders based on Suppliers". The report interface includes a sidebar for "Fields" with sections for "Groups" (containing "Supplier ID" and "Purchase Order: Purchase Order ID") and "Columns" (containing "# Order Count" and "# Total Order Cost"). The main area displays a table with the following data:

Supplier ID	Purchase Order: Purchase Order ID	Order Count	Total Order Cost
Supplier-001 (4)	Purchase-0001 (1) Purchase-0002 (1) Purchase-0003 (1) Purchase-0004 (1)	3 2 3 4	\$2,075.00 \$3,250.00 \$7,000.00 \$9,500.00
Supplier-002 (1)	Purchase-0005 (1)	2	\$4,500.00
	Total (5)	14	\$26,325.00

ew Report

- 1. Click on App Launcher on the left side of the screen.**
- 2. Search Medical Inventory Management App & click on it.**
- 3. Click on Reports Tab.**
- 4. Click on Purchase Orders based on Suppliers and see records.**

The screenshot shows a software interface for 'Medical Inventory ...'. At the top, there's a navigation bar with links for 'Products', 'Purchase Orders', 'Order Items', 'Inventory Transactions', 'Suppliers', 'Reports' (which is currently selected), and 'Dashboards'. A search bar and various icons are also at the top. The main area is titled 'Report: Purchase Orders' and 'Purchase Orders based on Suppliers'. It shows summary statistics: 'Total Records' (5), 'Total Order Count' (14), and 'Total Total Order Cost' (\$26,325.00). Below this is a detailed table with columns for 'Supplier ID', 'Purchase Order', 'Order Count', and 'Total Order Cost'. The data is grouped by supplier, with rows for Supplier-001 (4) and Supplier-002 (1). The table includes a 'Total' row at the bottom. At the bottom of the report area, there are several toggle buttons for 'Row Counts', 'Detail Rows', 'Subtotals', and 'Grand Total'.

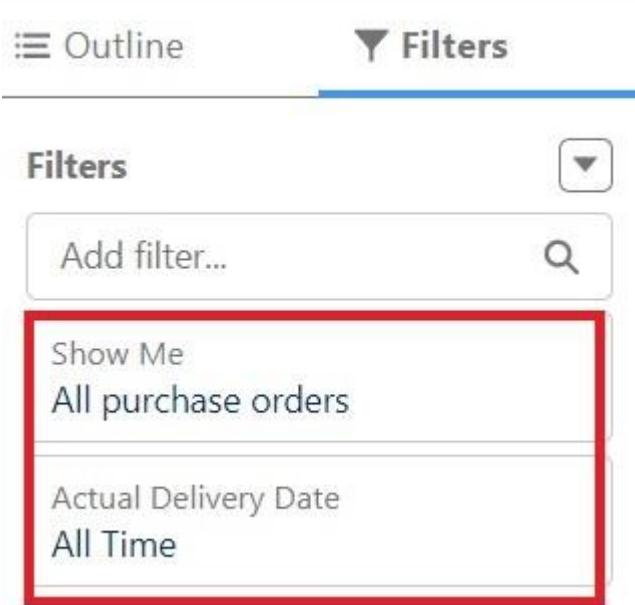
Total Records	Total Order Count	Total Total Order Cost	
5	14	\$26,325.00	
Supplier ID	Purchase Order: Purchase Order ID	Order Count	Total Order Cost
Supplier-001 (4)	Purchase-0001 (1)	3	\$2,075.00
	Purchase-0002 (1)	2	\$3,250.00
	Purchase-0003 (1)	3	\$7,000.00
	Purchase-0004 (1)	4	\$9,500.00
Supplier-002 (1)	Purchase-0005 (1)	2	\$4,500.00
Total (5)		14	\$26,325.00

Activity 2: Create a Complete Purchase Details Report

Duration: 0.1 Hrs

Skill Tags:

1. Click App Launcher
2. Select Medical Inventory Management App
3. Click on Reports tab
4. Click on New Report.
5. Click the report type as Purchase Orders with Order Items and Product ID >> Click Start report.
6. Click on Filters and select as follows and click on Apply



7. Customize your 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).
8. Click save and run
9. Give report name –Complete Purchase Details Report
10. Click Save

Milestone 16 - Dashboards

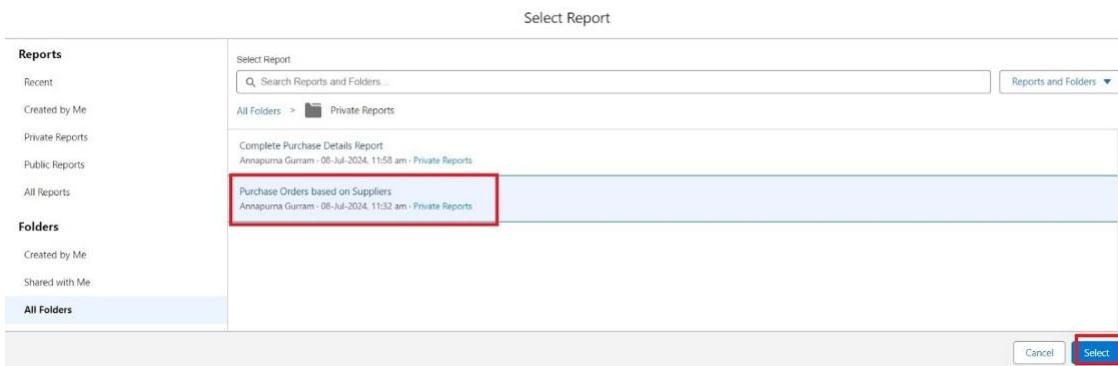
Dashboards in Salesforce are dynamic visual representations of key metrics and data from reports, providing a consolidated view of organizational performance and trends. They are powerful tools for monitoring real-time data, tracking progress towards goals, and gaining actionable insights at a glance.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

Activity 1: - Create Dashboard

Duration: 0.05 Hrs

Skill Tags:

1. Click on the Dashboards tab from the Medical Inventory Management application.
2. Click on the new dashboard.
3. Give name - Medical Inventory DashBoard
4. Click create
5. Click on +widget
6. Select the Purchase Orders based on Suppliers Report
7. For the data visualization select any of the charts, tables etc. as per your choice/requirement
8. Click add.
9. Click save.



Add Widget

Report

Purchase Orders based on Supplier X

Use chart settings from report i

Display As


Value

Sum of Total Order Cost

Sliced By

Supplier ID

Display Units

Preview

Purchase Orders based on Suppliers

Sum of Total Order Cost

Supplier ID

Supplier-001 

Supplier-002 



₹26k

₹4.5k

₹22k

[View Report \(Purchase Orders based on Suppliers\)](#)

Cancel Add

Add Widget

Title
Purchase Orders based on Suppliers

Subtitle

Footer

Legend Position
Right

Widget Theme
 Light (Dashboard default)

 Dark


Preview

Purchase Orders based on Suppliers

Sum of Total Order Cost

Supplier ID

Supplier-001

Supplier-002

₹26k

₹4.5k

₹22k

View Report (Purchase Orders based on Suppliers)

Cancel Add

Activity 2: View Dashboard

Duration: 0.05 Hrs

Skill Tags:

1. Click on App Launcher on the left side of the screen.
2. Search Medical Inventory Management & click on it.

3. Click on Dashboard Tab.
4. Click on Medical Inventory DashBoard see graph view of records

