PROJECT TITLE : MEDICAL INVENTORY MANAGEMENT

SUBMITTED BY:

SURYA PRAKASH E (811022104050)- Team Leader

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VIGNESHWAREN K (811022104052)

VIMALJI C (811022104053)

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/r9EX3lGde5k

Activity 1: Creating Developer Account

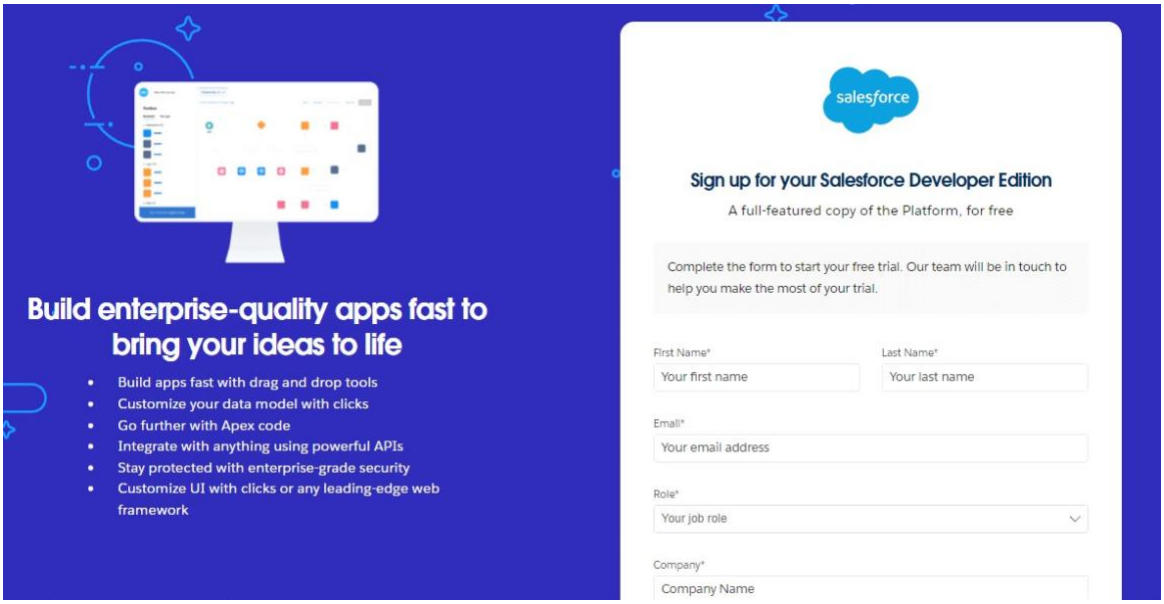
Duration: 0.1 Hrs

Skill Tags:

1. **Creating a developer org in salesforce.**

Go to https://developer.salesforce.com/signupOn 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**

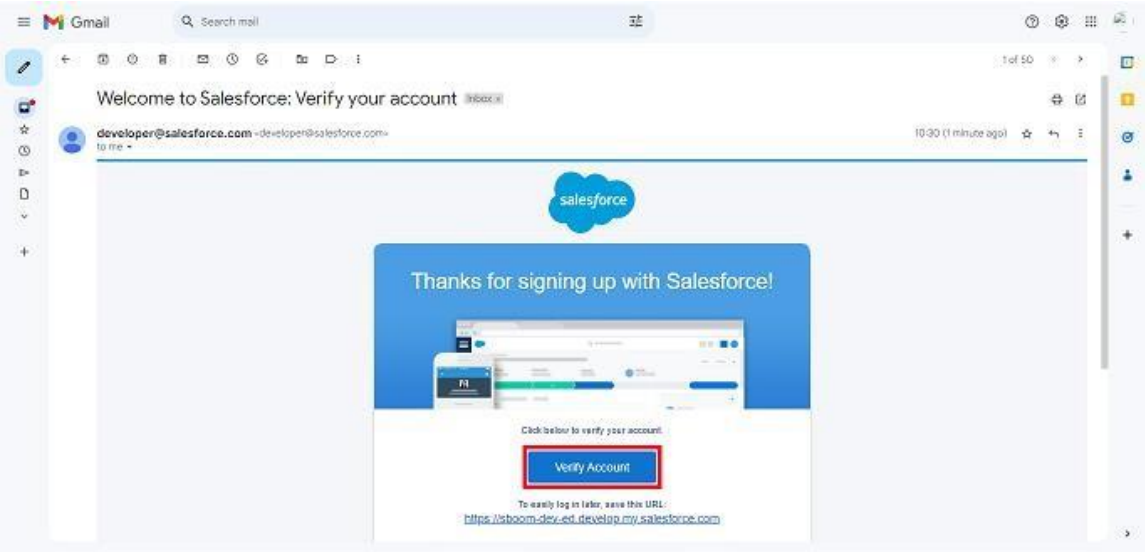
This need not be an actual email id, you can give anything in the format : username@organization.com

Activity 2: Account Activation

Duration: 0.1 Hrs

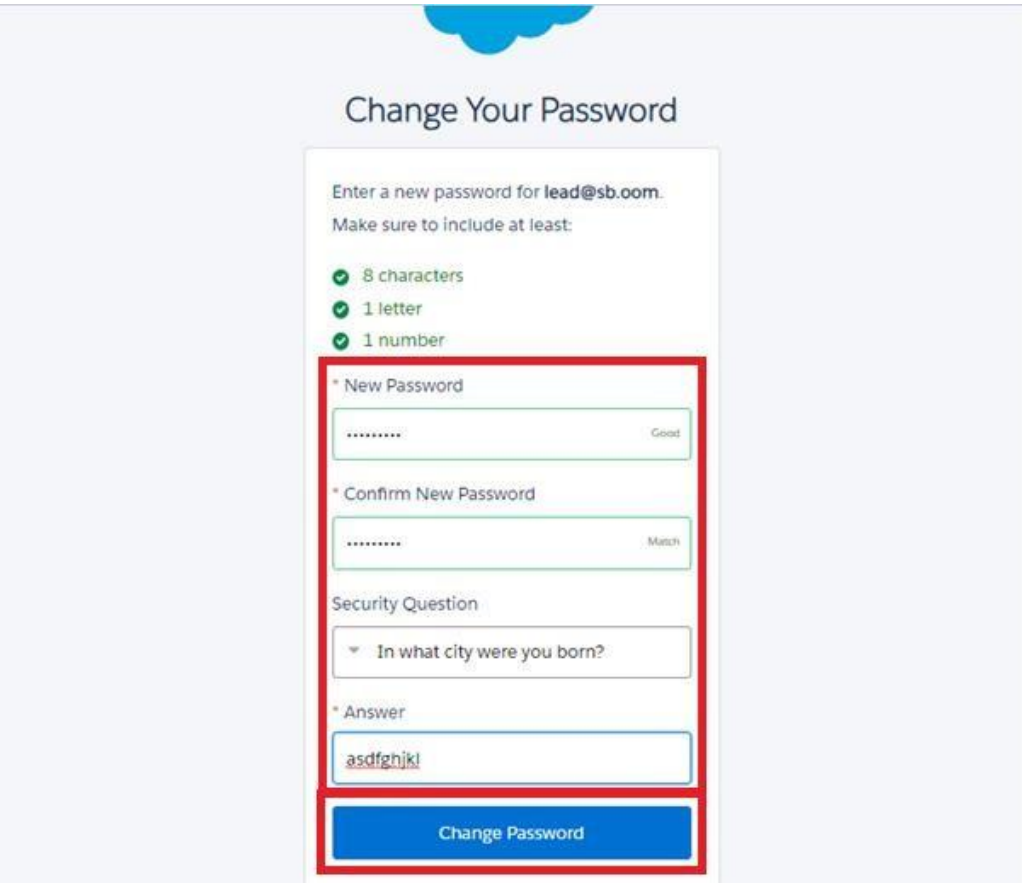
Skill Tags:

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.**

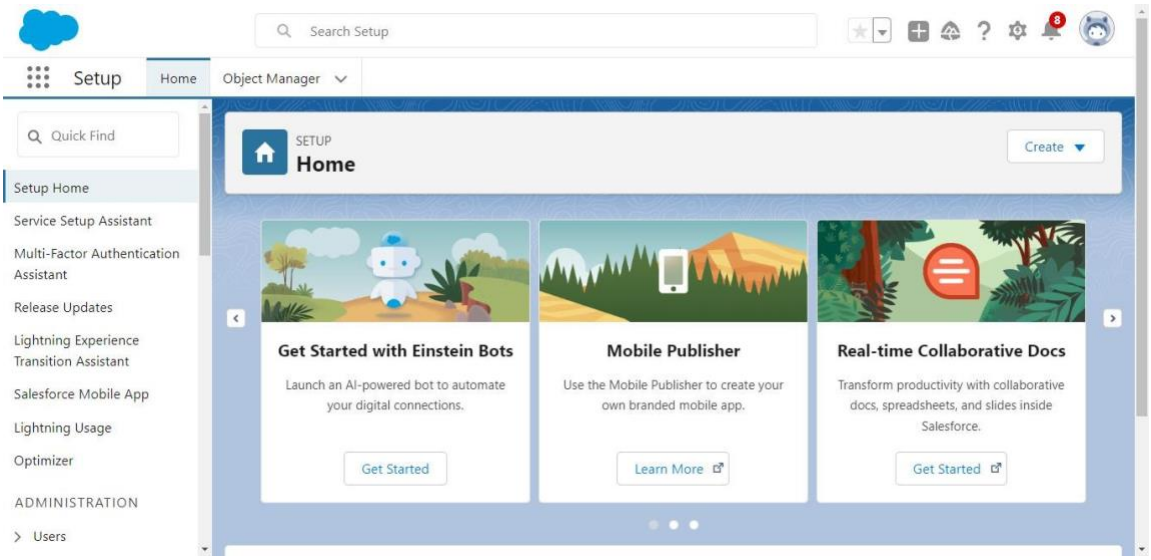


2. **Click on Verify Account**

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



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



Milestone 2- Objects

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

Milestone 1-Salesforce Account

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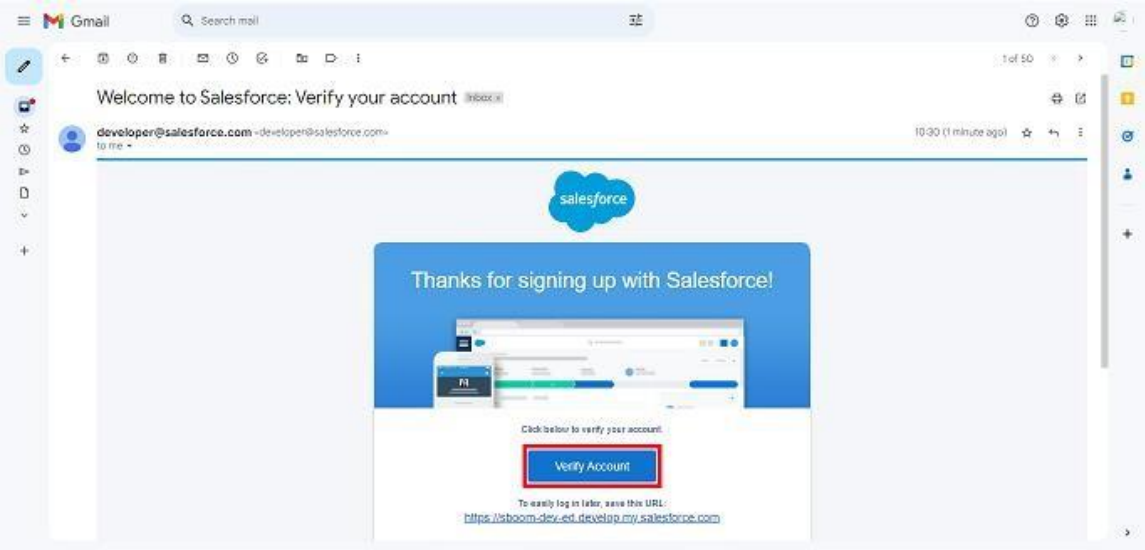

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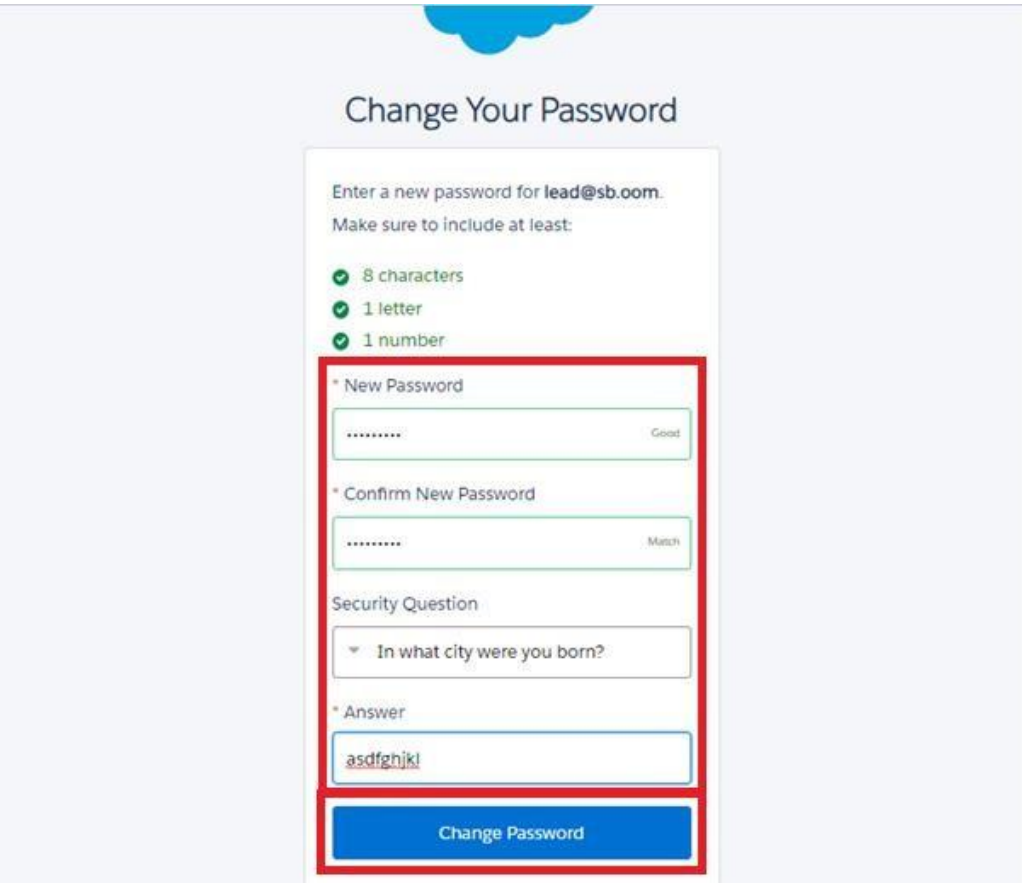

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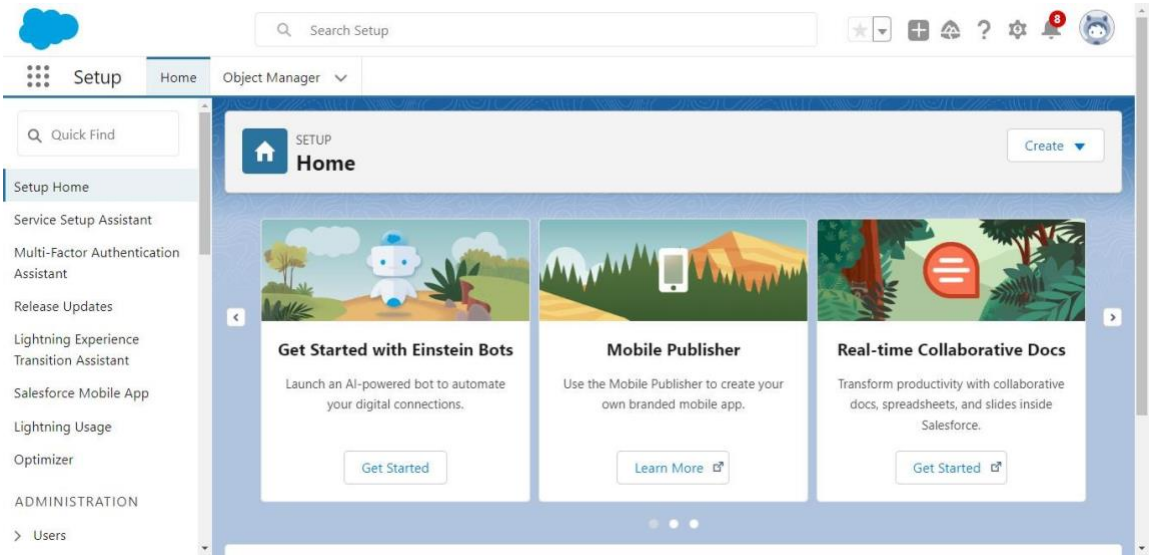


Milestone 3- Tabs

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

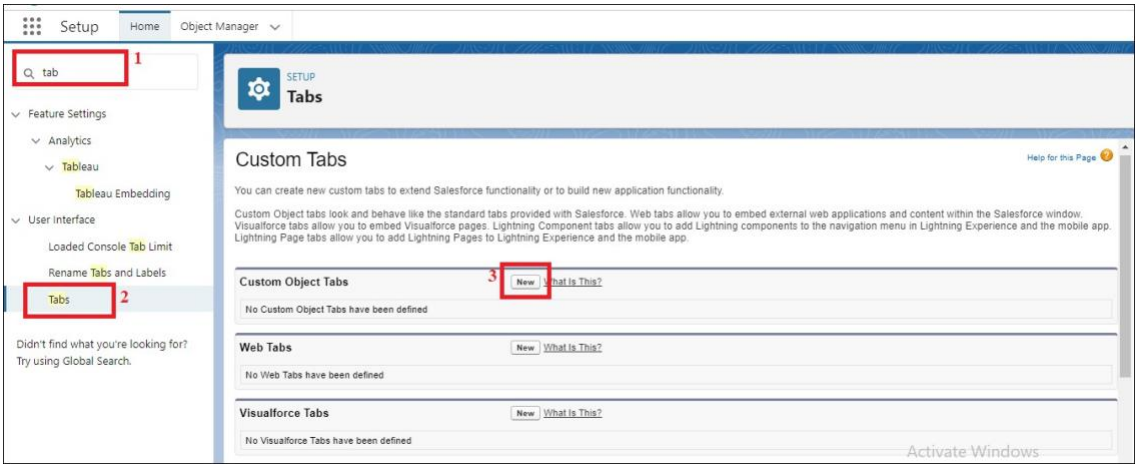
3. Click on New (under custom object tab).

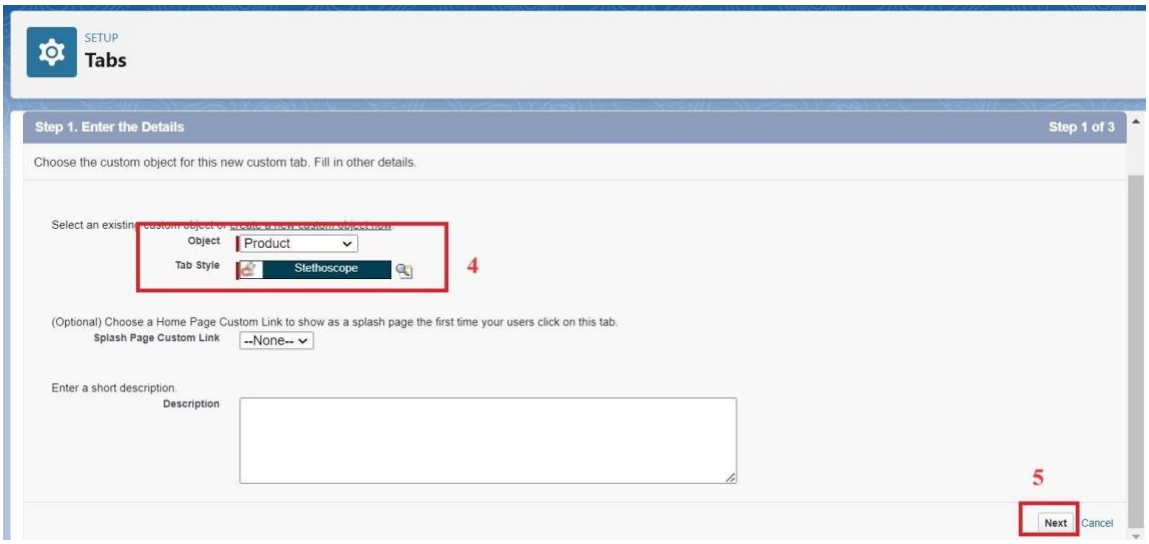
4. Select Object(Product) >> Select the tab style

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 ş 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

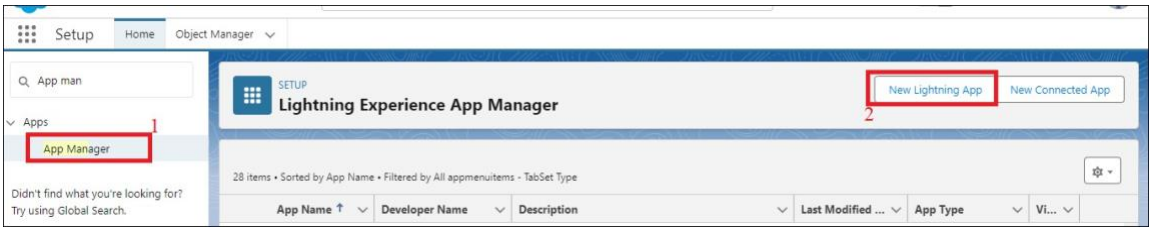
4. Under App Options, leave the default selections and click next.

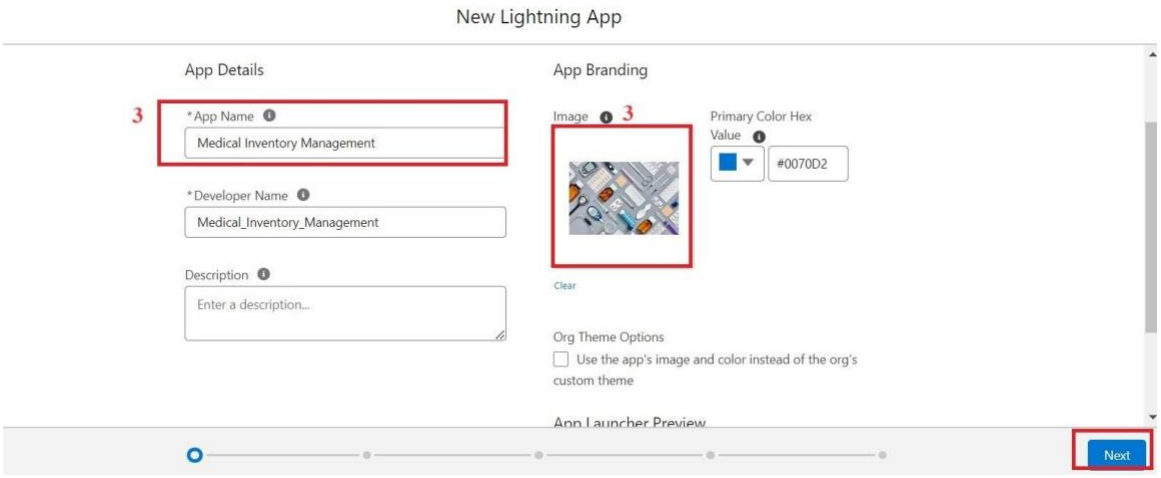
5. Under Utility Items, leave as is and click Next.

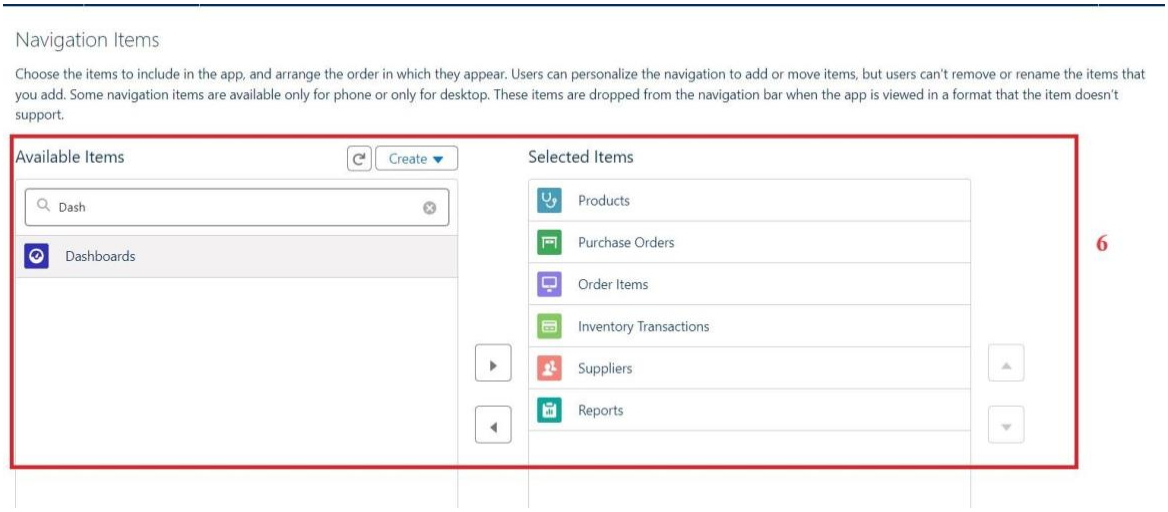
6. From Available Items, select Products, Purchase Orders, Order Items, Inventory Transactions, Suppliers, Reports, and Dashboards and move them to Selected Item and Click Next.

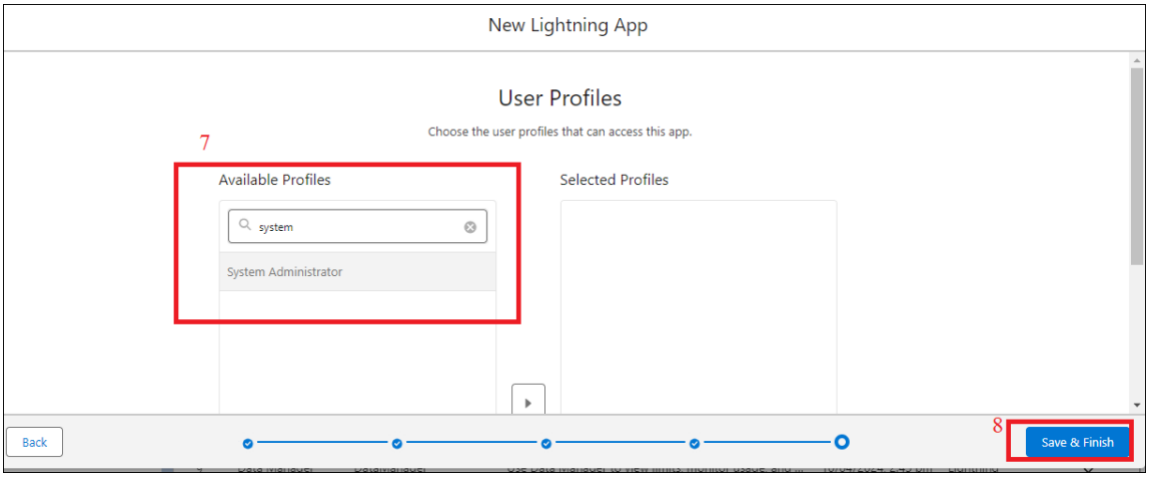
7. From Available Profiles, select System Administrator and move it to Selected Profiles.

8. Click Save & Finish.









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Activity 1: Create a Lightning App for Medical Inventory Management

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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.

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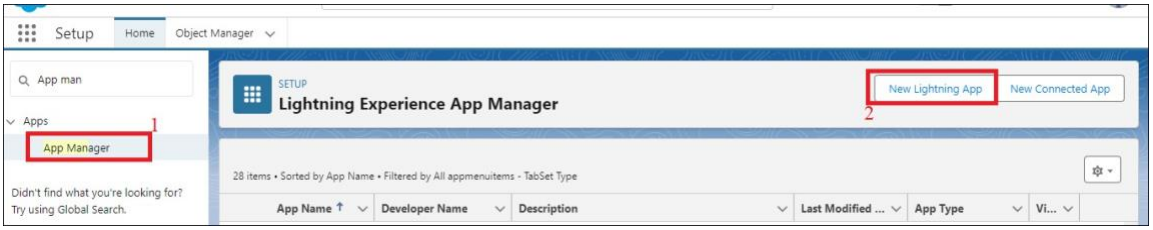
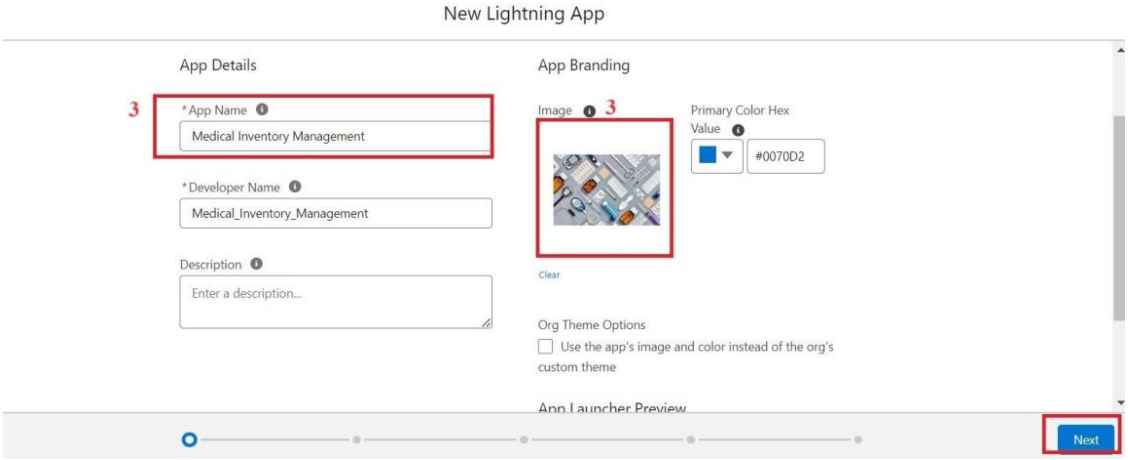
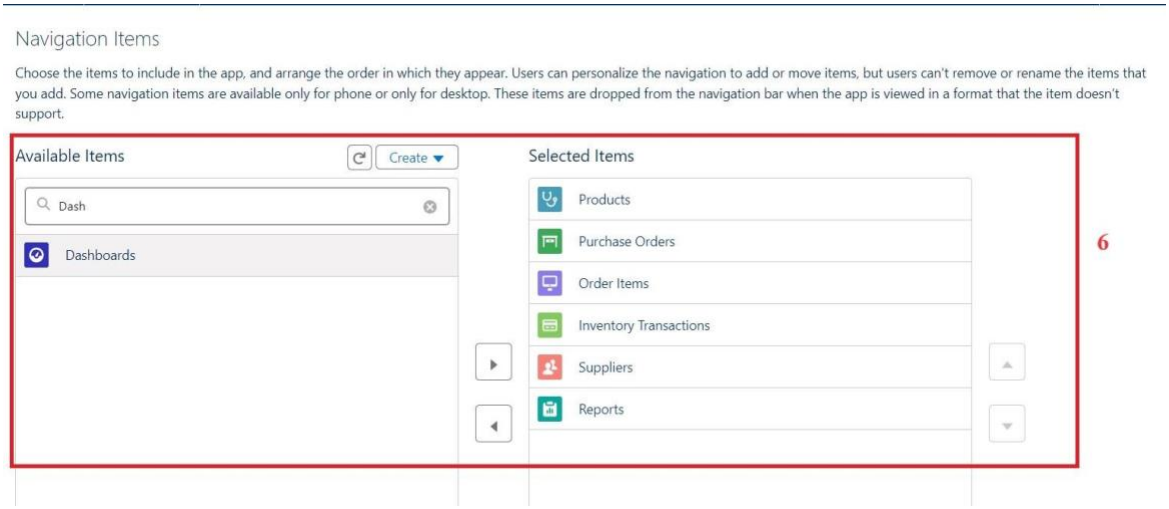
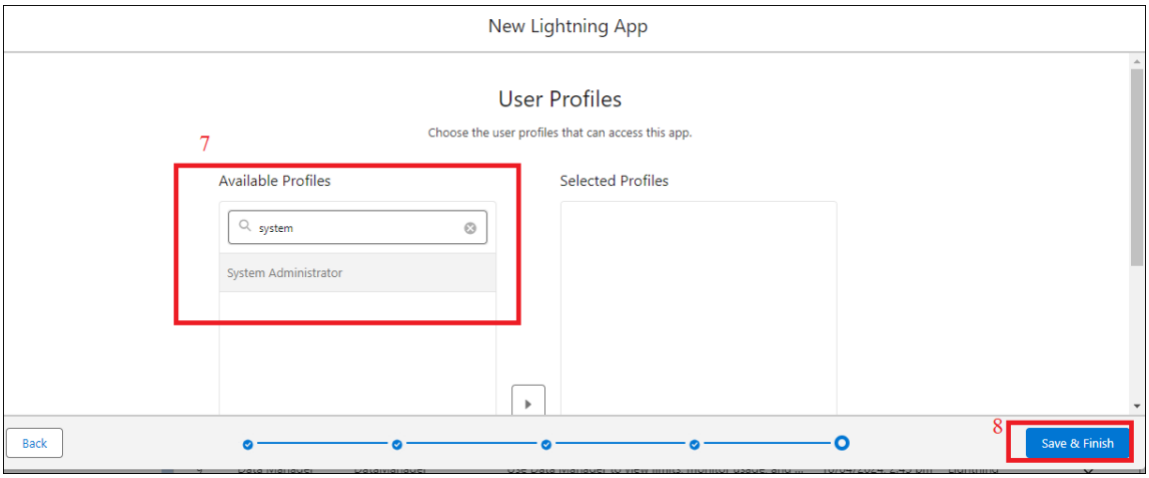








Milestone 4- The Lightning App

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**

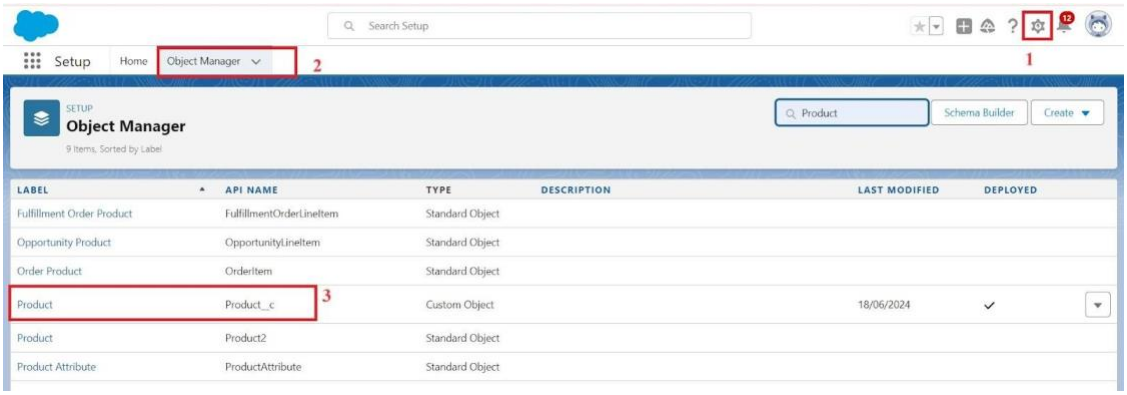
6. **Click on New**

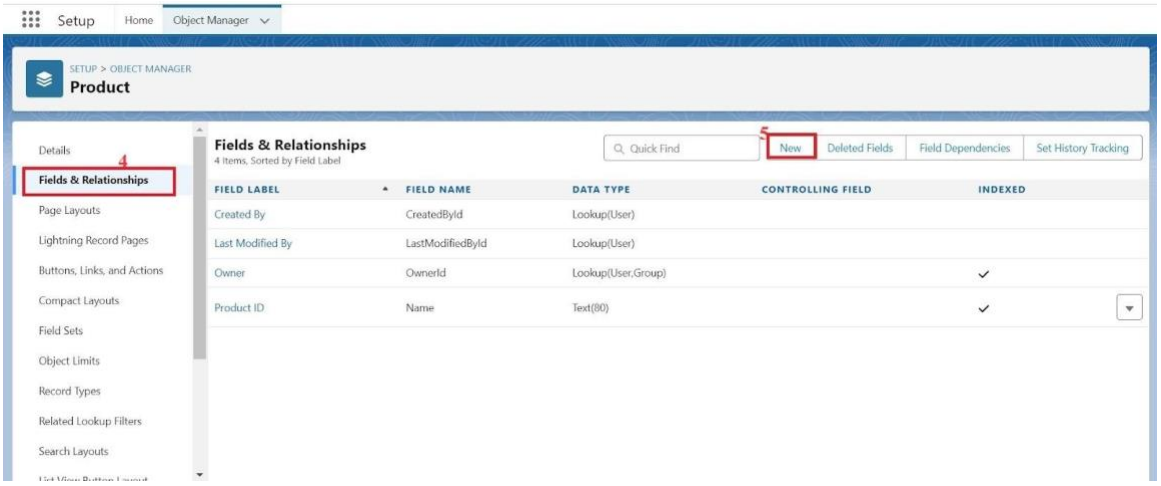
7. **Select Text field, click Next**

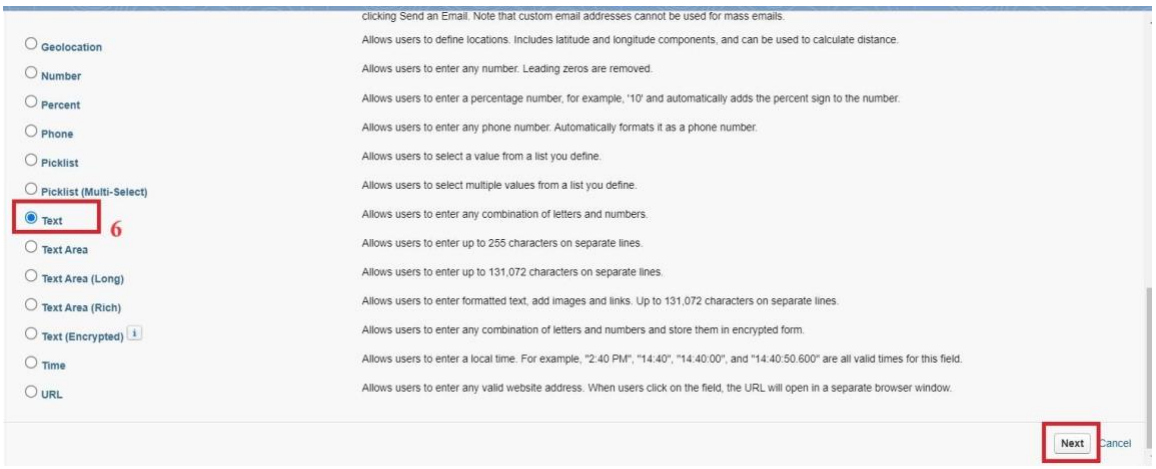
8. **Enter Field Label as Product Name and Length 255.**

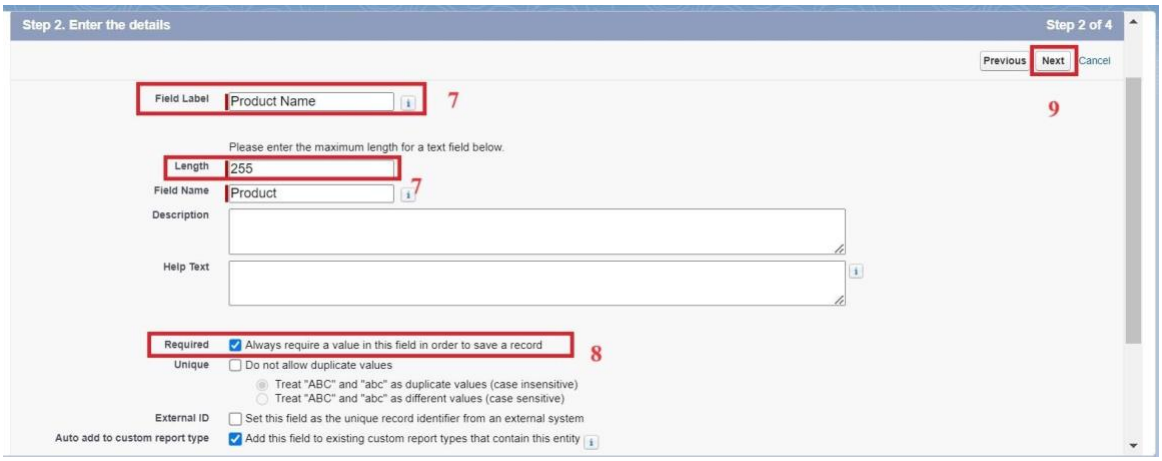
9. **Select Required Field.**

10. **Click Next, Next, then Save & New.**









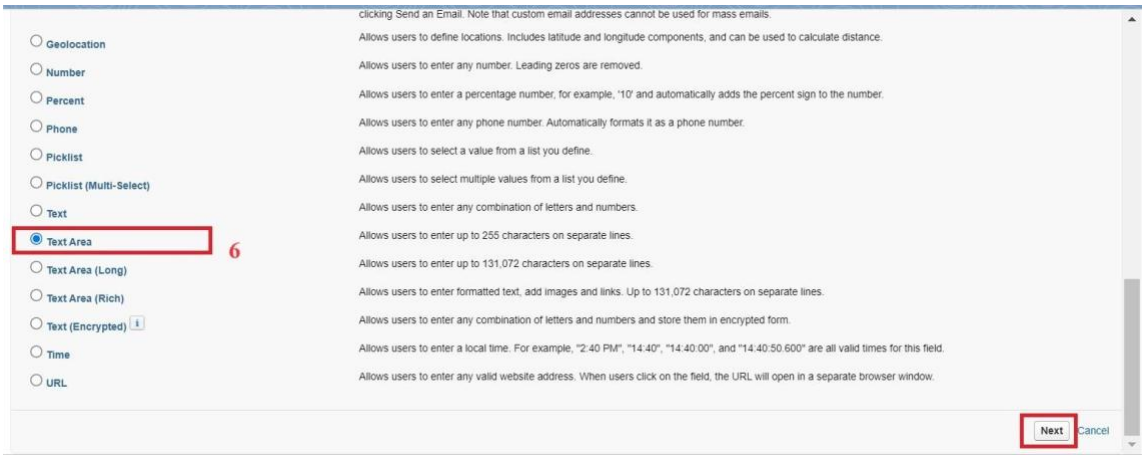
Activity 2: Creating a TextArea Field in Product Object

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.**



Activity 3: Creating a Number Field in Product object

Duration: 0.05 Hrs

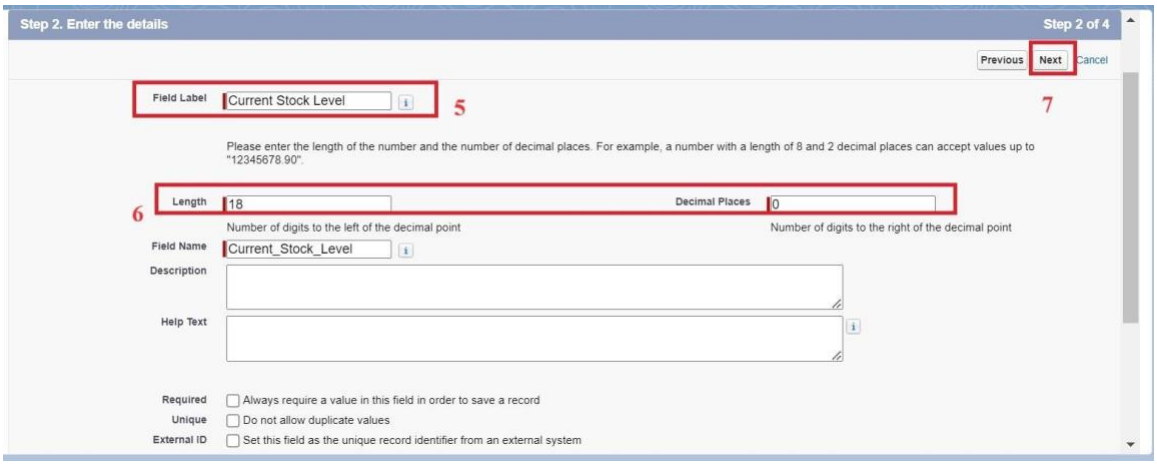
Skill Tags:

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"**

C3.lick 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.**



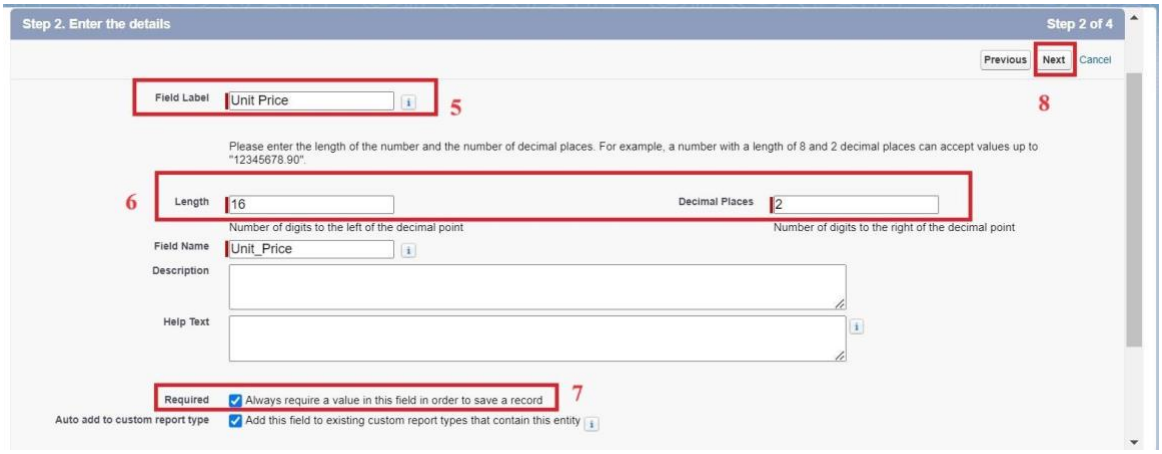
Activity 4: Creating a Currency Field in Product object

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.**



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.**

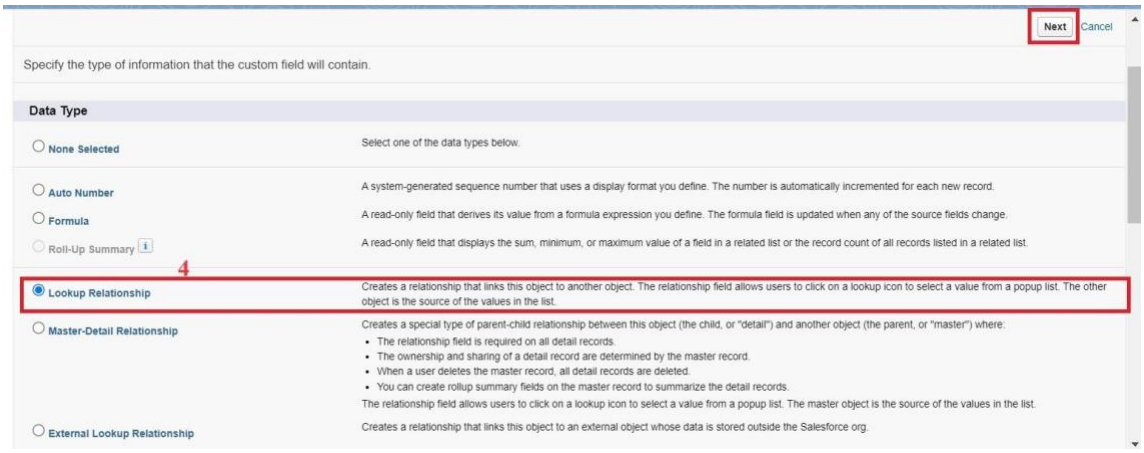
5. Select the related object 'Supplier'

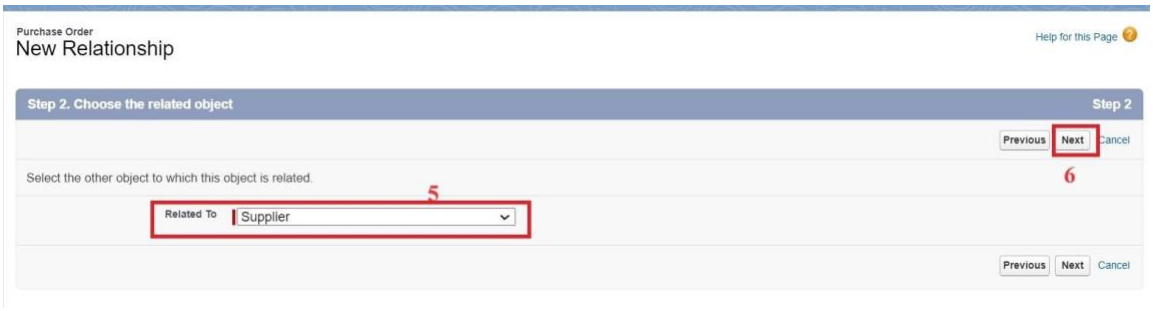
6. Click on Next.

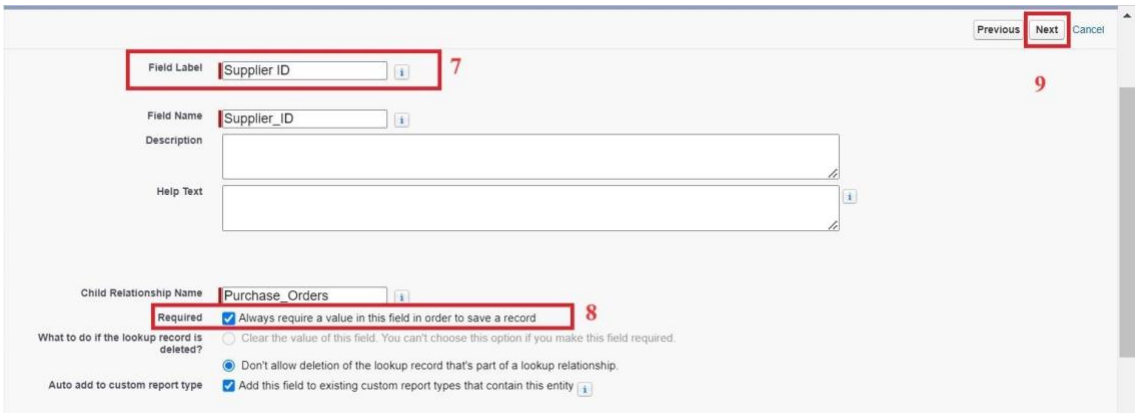
7. Give Field Label as 'Supplier ID'

8. Select Required Field.

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







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'**
6. **Click on Next, Next and Save.**

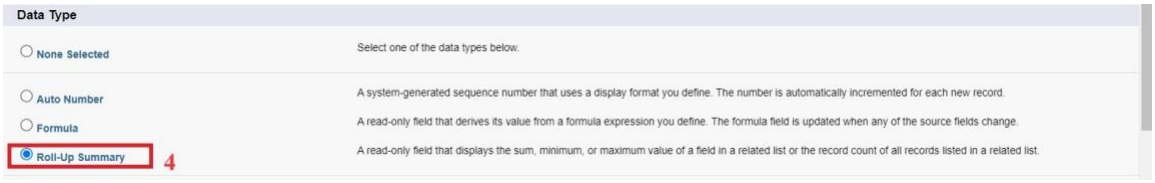
Activity 7: Creating a Roll-Up Summary Field in Purchase Order object

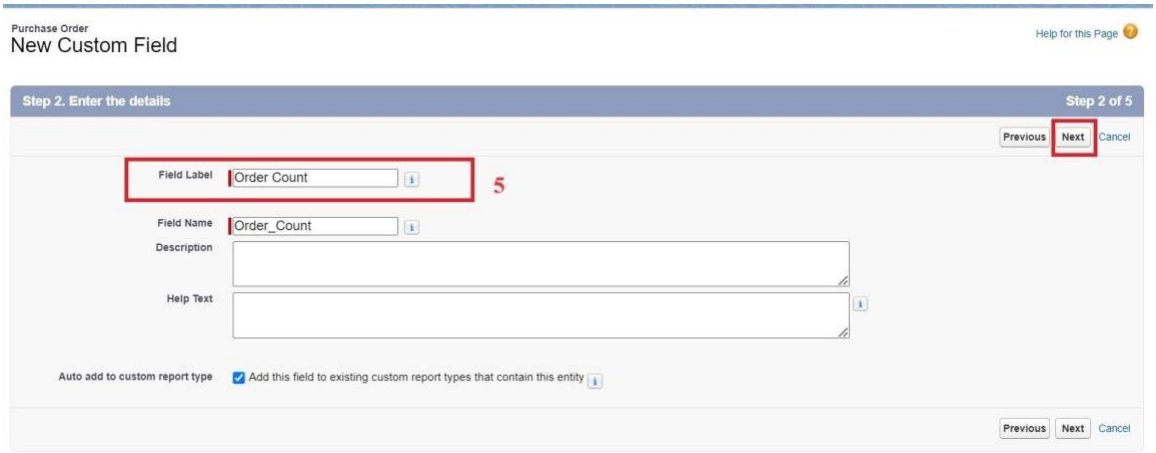
Duration: 0.05 Hrs

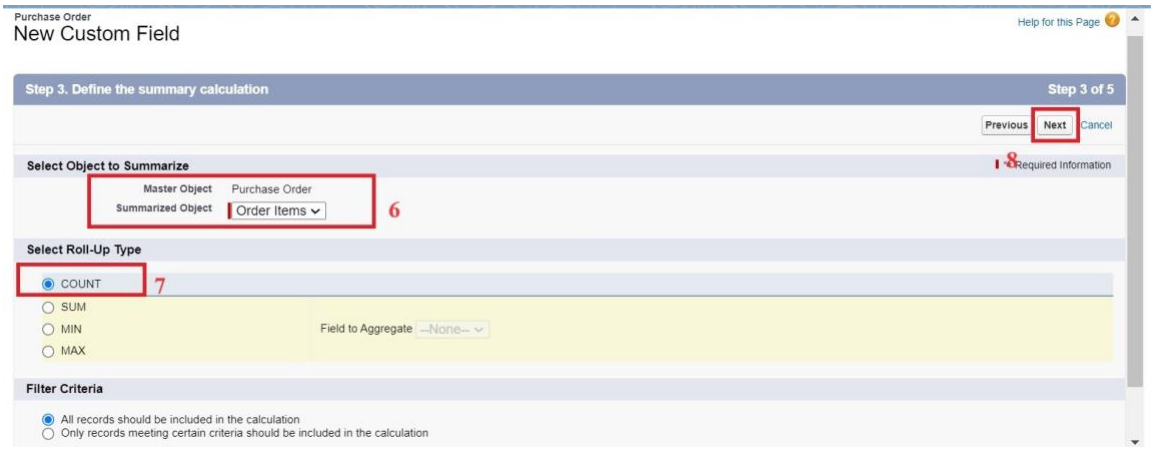
Skill Tags:

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.**







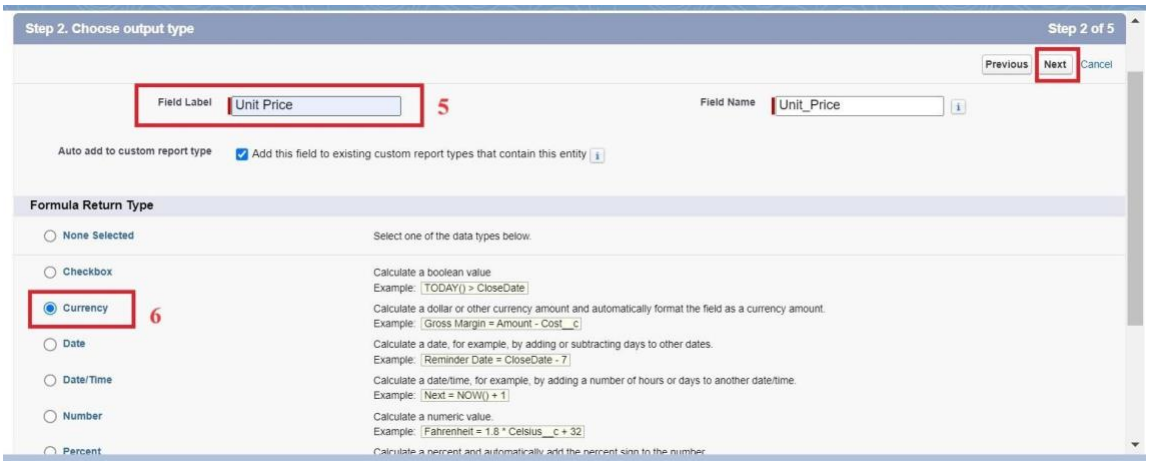
Activity 8: Creating a Unit Price Formula Field in Order Item object

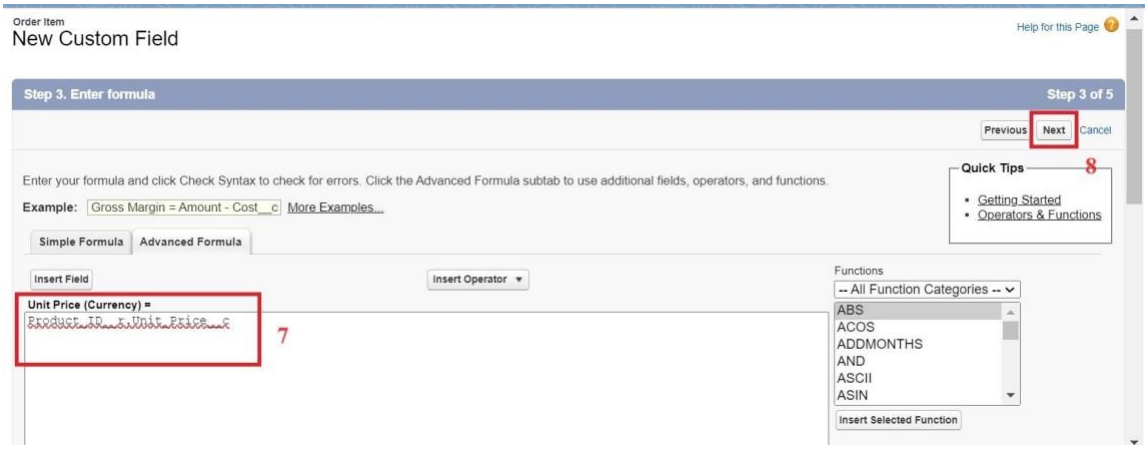
Duration: 0.05 Hrs

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.**





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**
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.

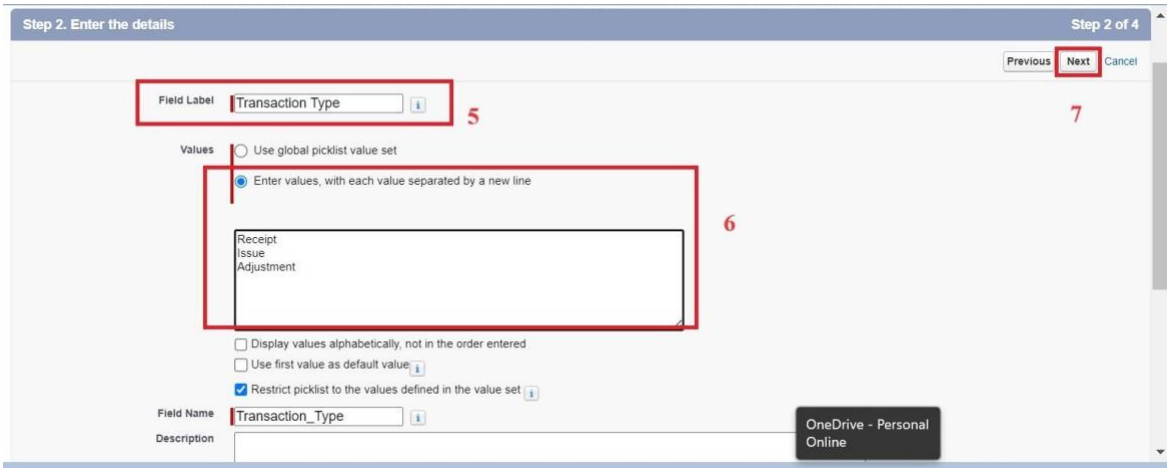
6. In values select "Enter values, with each value separated by a new line" and enter values as shown below.

Receipt

Issue

Adjustment

7. Click on Next, Next and Save.



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

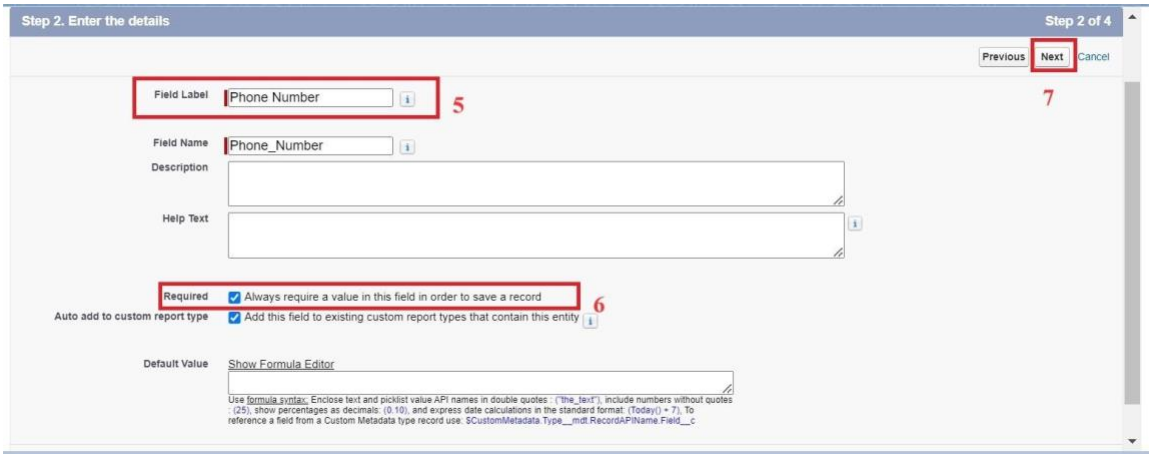
Skill Tags:

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.



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.

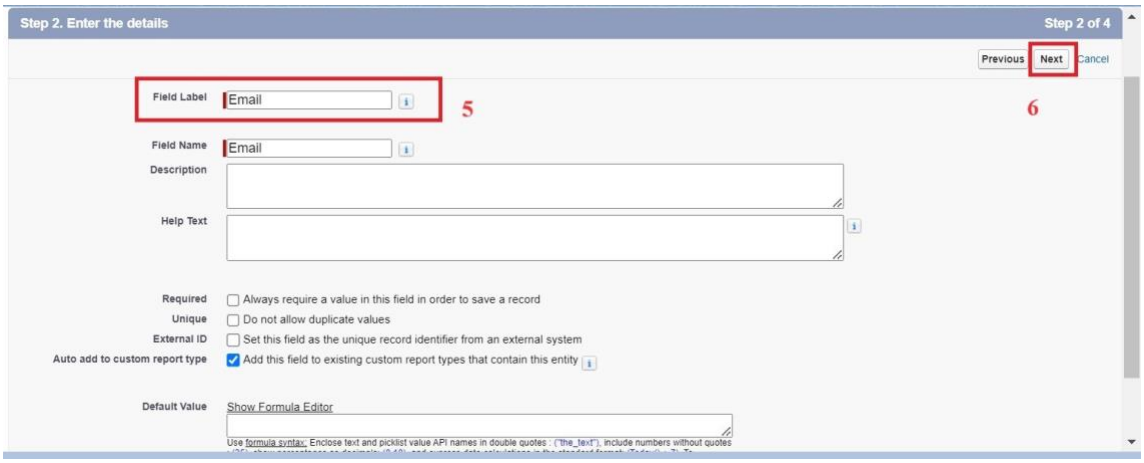
2. Now click on Fields & Relationships

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.



Milestone 6 -Editing of Page Layouts

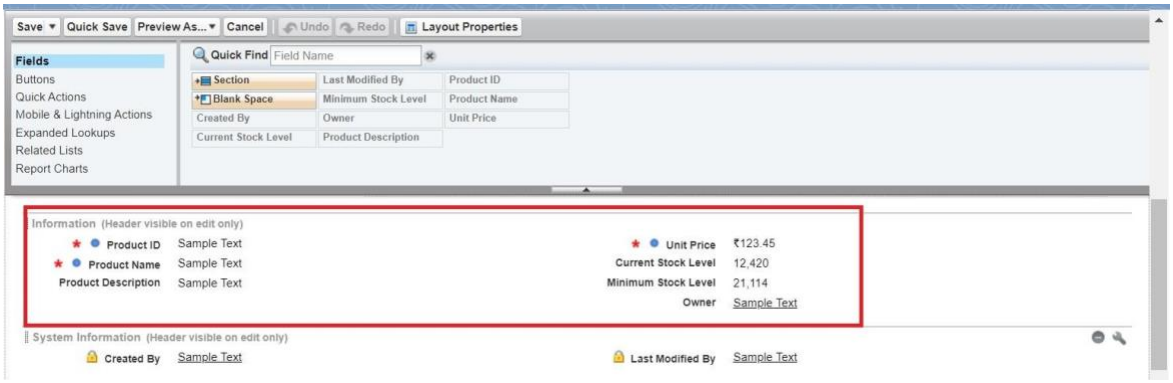
Page layouts in Salesforce are used to customize the organization, structure, and content of pages for viewing and editing records. They determine which fields, related lists, and custom links are visible to users, as well as the order and grouping of those elements.

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

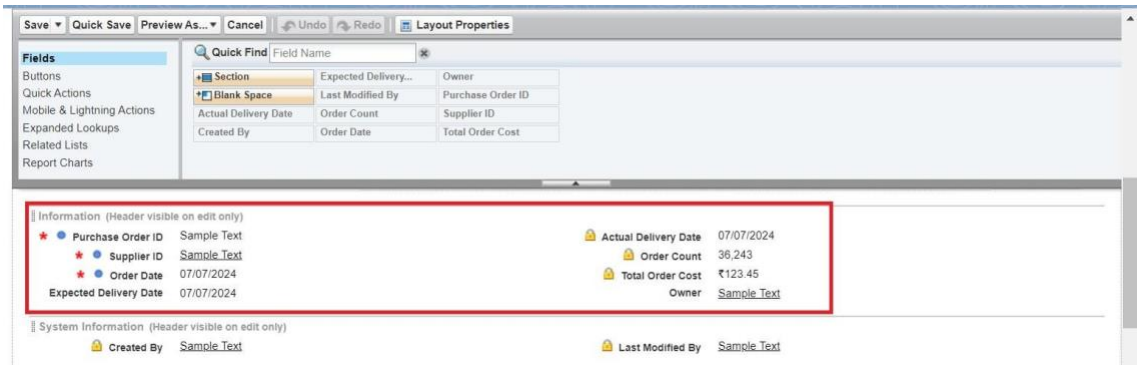
Duration: 0.05 Hrs

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

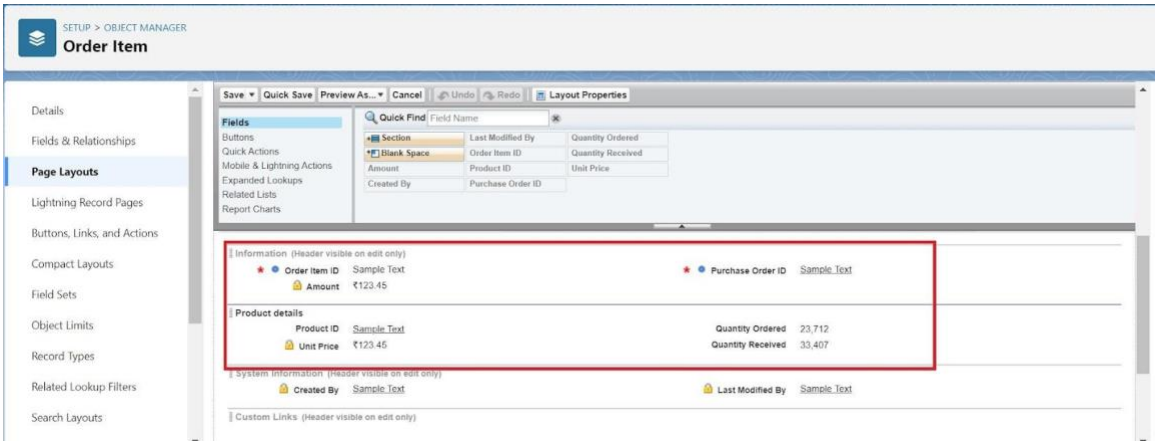
Duration: 0.05 Hrs

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



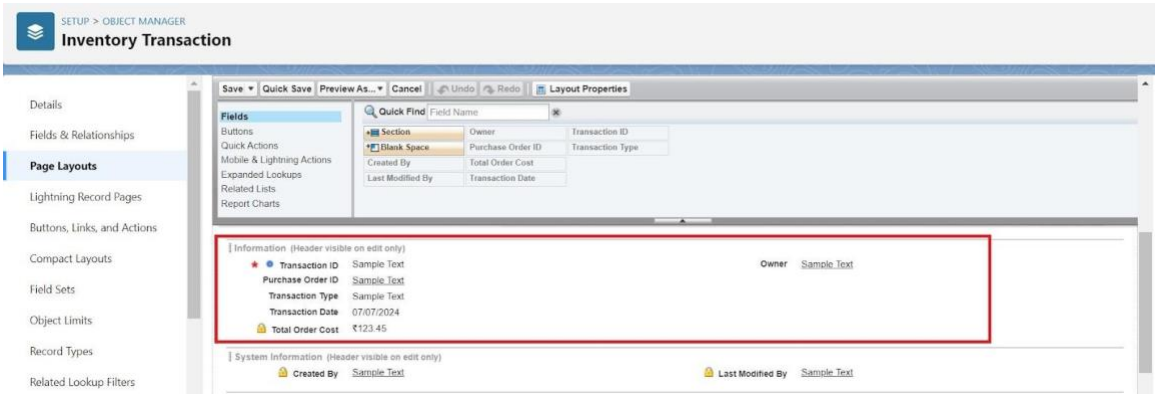
4. Click Save.

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

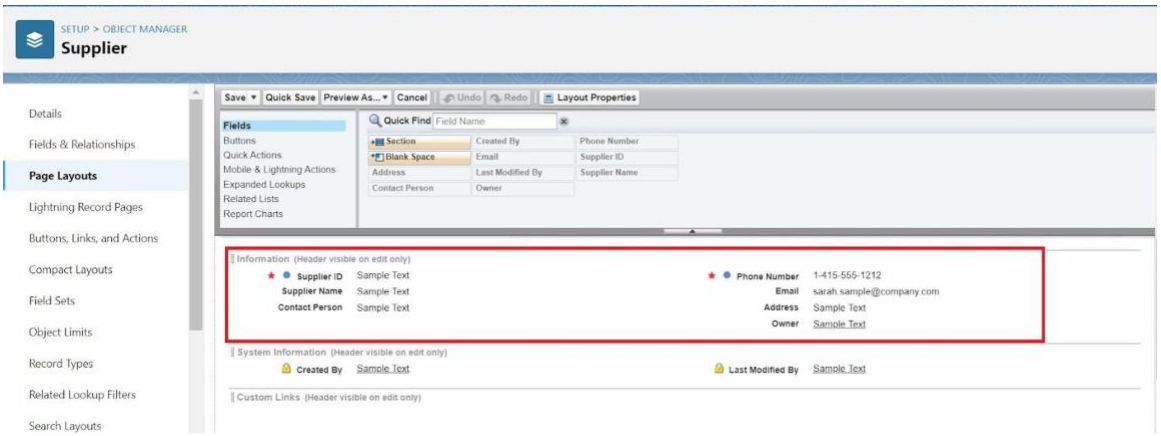
Duration: 0.05 Hrs

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

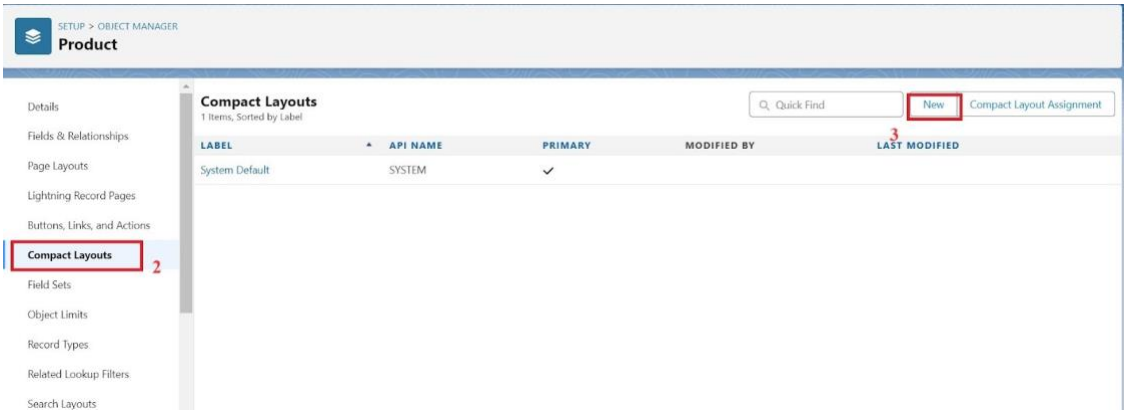
Page layouts in Salesforce are used to customize the organization, structure, and content of pages for viewing and editing records. They determine which fields, related lists, and custom links are visible to users, as well as the order and grouping of those elements.

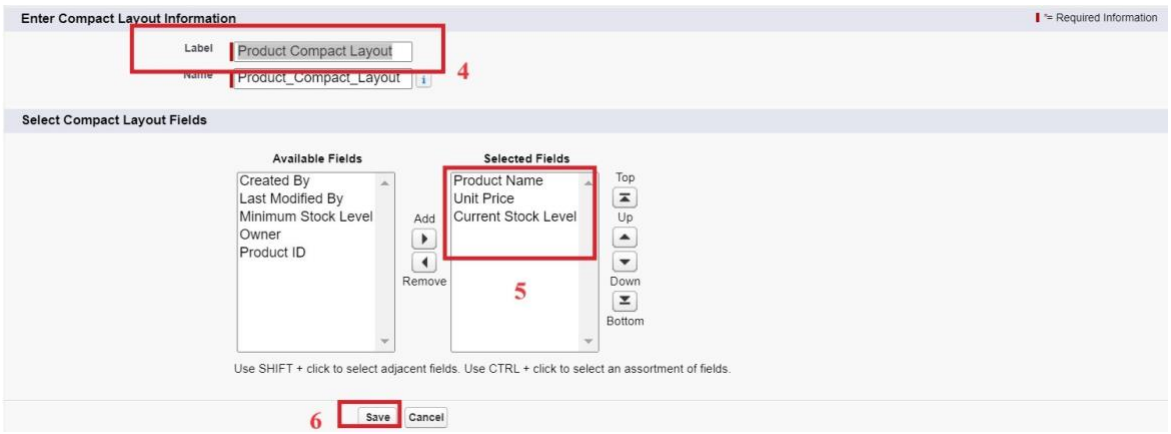
Activity 1: To create a Compact Layout to a Product Object

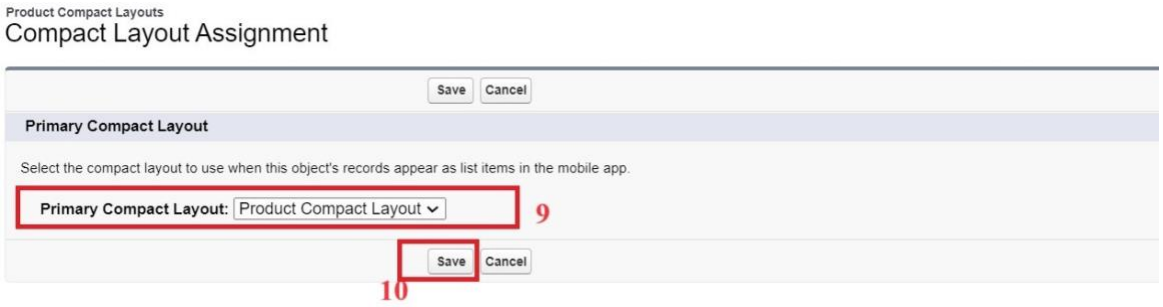
Duration: 0.05 Hrs

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.**







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 .**

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

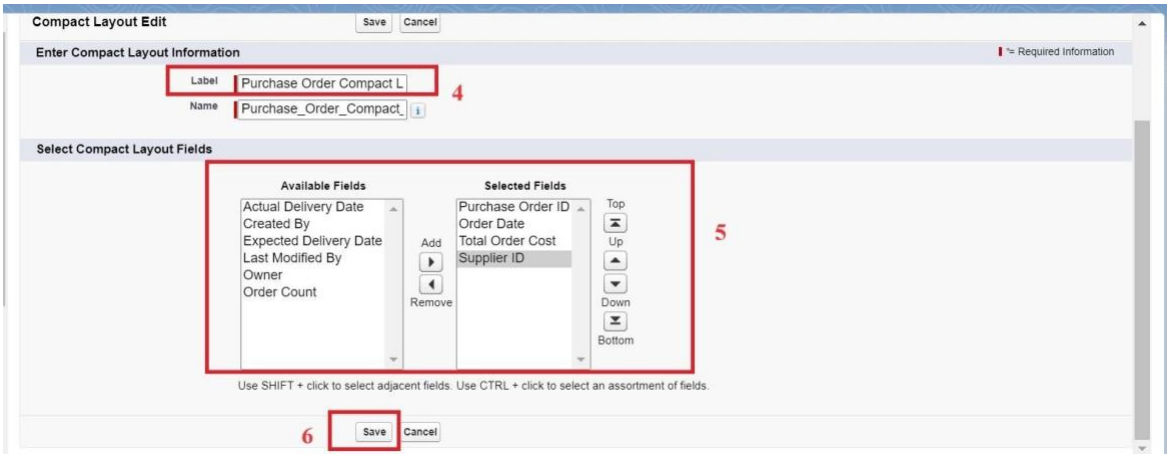
6. **Click Save.**

7. **Click Compact Layout Assignment.**

8. **Click Edit Assignment.**

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

10. **Click Save.**



Milestone 8 - Validation Rules

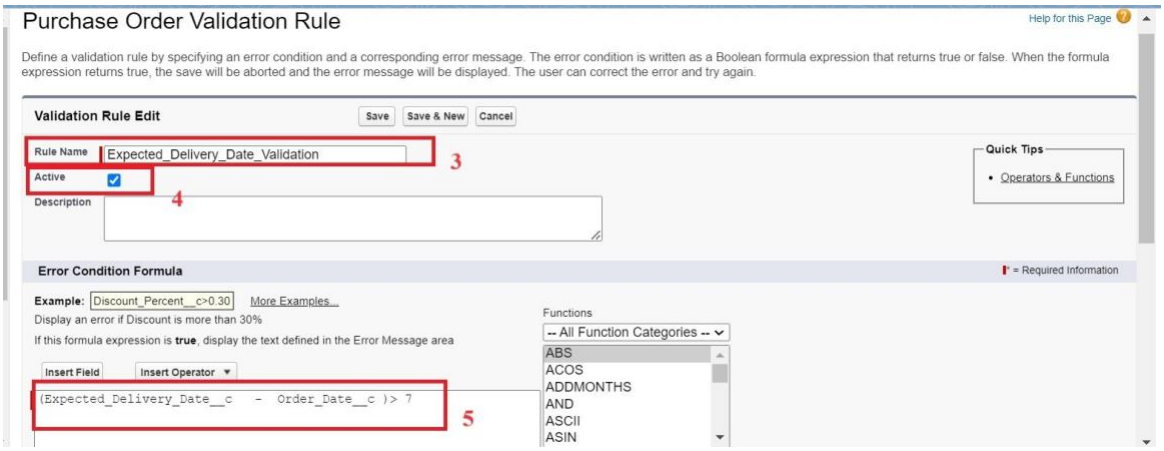
Validation rules in Salesforce are used to ensure data integrity by preventing users from saving invalid data in records. They consist of a formula or expression that evaluates the data in one or more fields and return a value of true or false. When the rule's criteria are met (i.e., the expression evaluates 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:

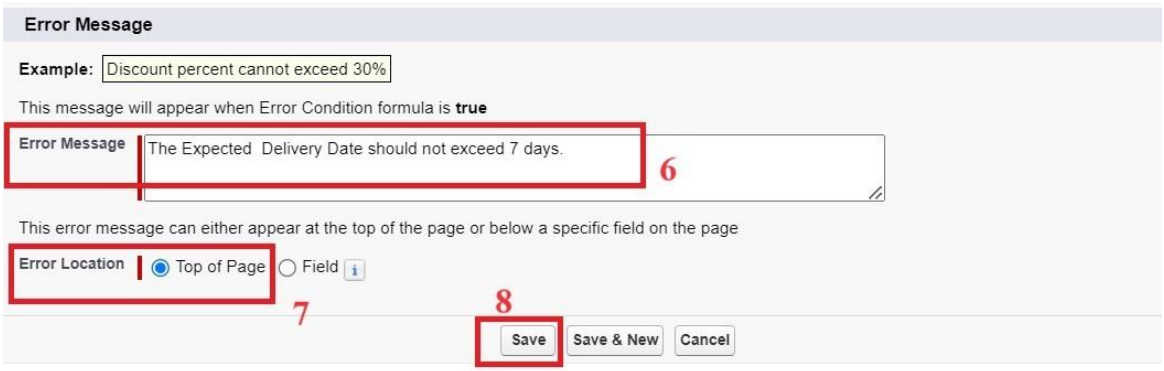
1. **Go to setup >> click on Object Manager >> type object name(Purchase Order) in quick find box>> click on the Purchase Order object**
2. **Click on the validation rule >> click on New.**
3. **Enter the Rule name as Expected Delivery Date Validation .**
4. **Select Active**
5. **Insert the Error Condition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



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

7. **Select the Error location as Top of Page**

8. **Click Save.**



Milestone 9 - Profiles

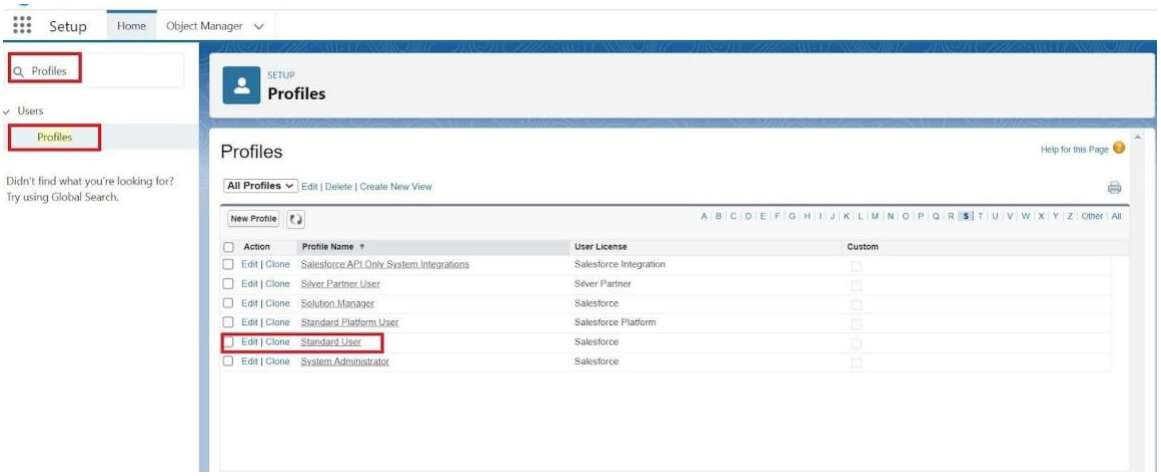
Profiles in Salesforce are fundamental to the platform's security model, defining what users can do within the organization. Profiles control a user's permissions to objects, fields, tabs, apps, and other settings. Each user in Salesforce must be assigned a profile, and the profile assigned to a user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

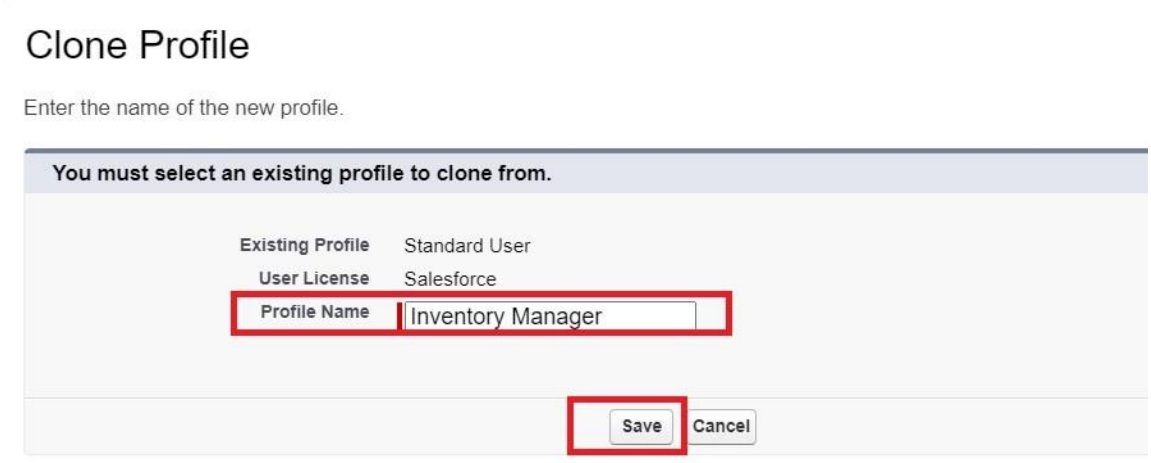
Activity 1: To create an Inventory Manager Profile

Duration: 0.1 Hrs

Skill Tags:

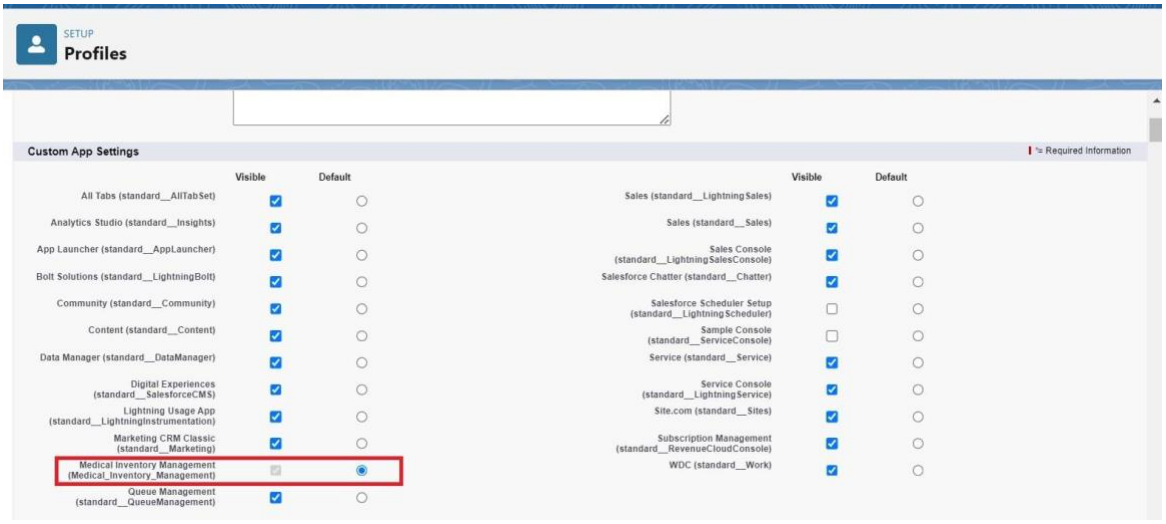
1. Go to setup >> type profiles in quick find box >> click on profiles >> clone the desired profile (Standard User) >> enter profile name (Inventory Manager) >> Save.





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

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

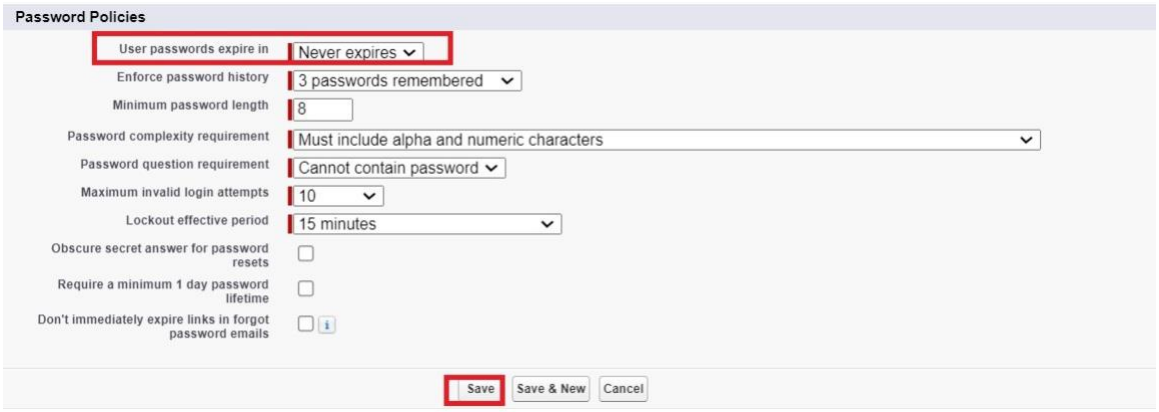


4. Scroll down to Custom Object Permissions and Give access permissions as mentioned in the below diagram.

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.



Activity 2: To create an Purchase Manager Profile

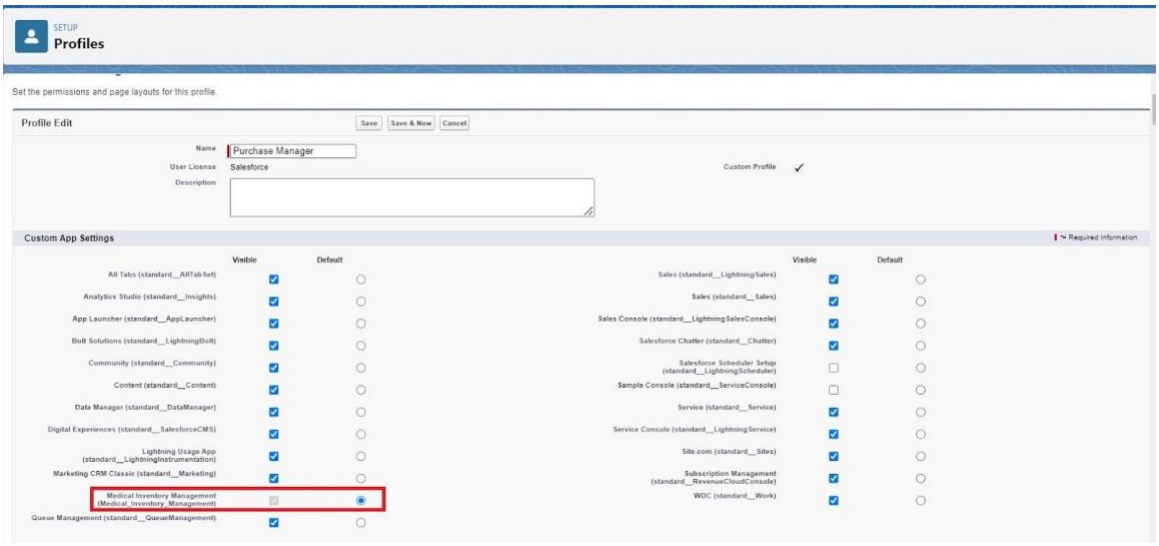
Duration: 0.1 Hrs

Skill Tags:

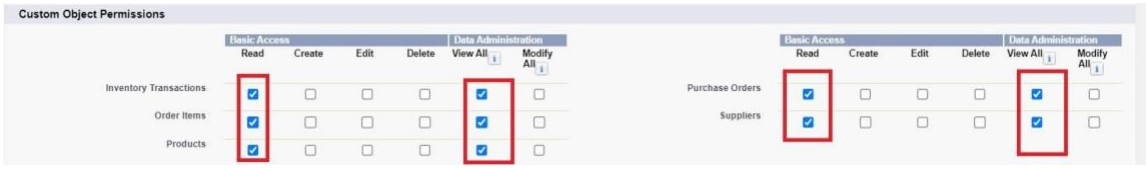
1. Go to setup >> type profiles in quick find box >> click on profiles >> clone the desired profile (Standard User) >> enter profile name (Purchase Manager) >> Save.

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

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



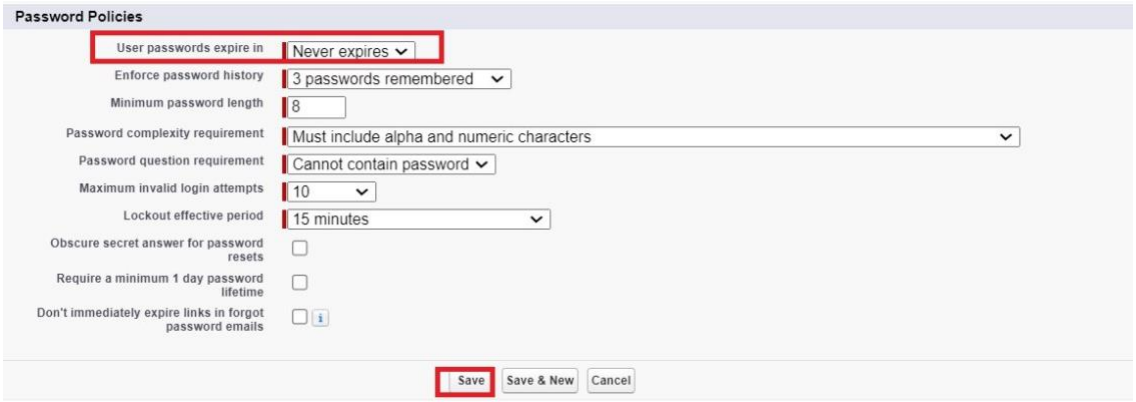
4. scroll down to Custom Object Permissions and Give access permissions as mentioned in the below diagram.



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.



Milestone 10 - Roles

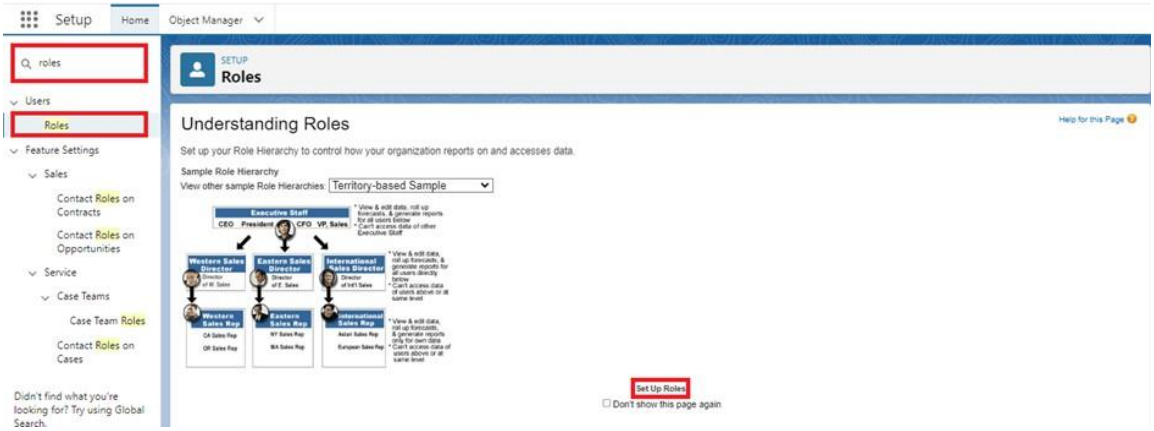
Roles in Salesforce are used to control record-level access and define the hierarchy of an organization, determining the level of visibility and sharing of records among users. Roles work in conjunction with profiles to provide a robust security model. While profiles control what actions users can perform (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

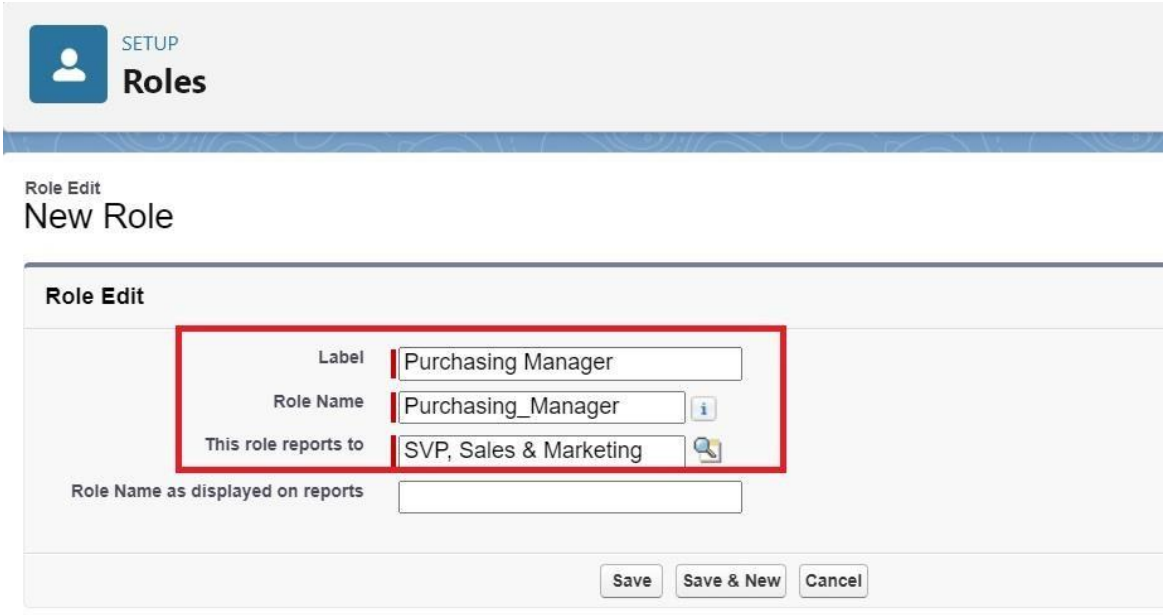
Skill Tags:

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.

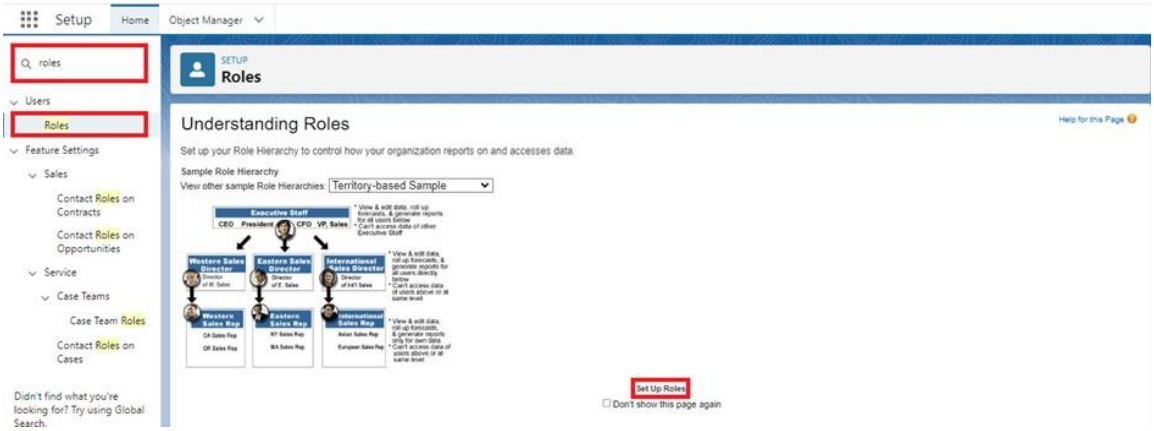


Activity 2 : Create a Purchasing Manager Role.

Duration: 0.05 Hrs

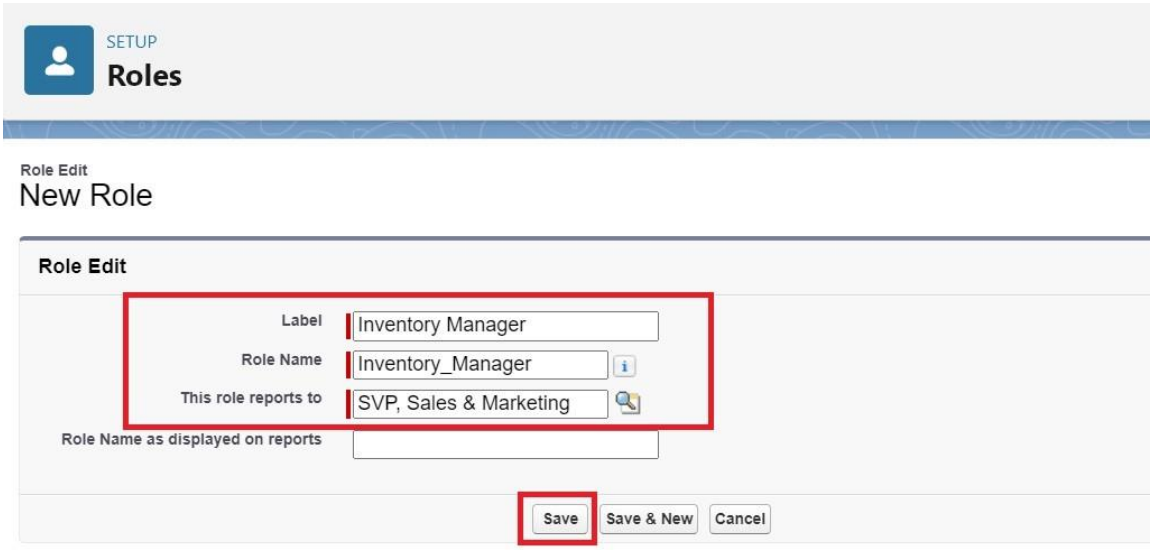
Skill Tags:

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



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.



Milestone 12 - Permission Sets

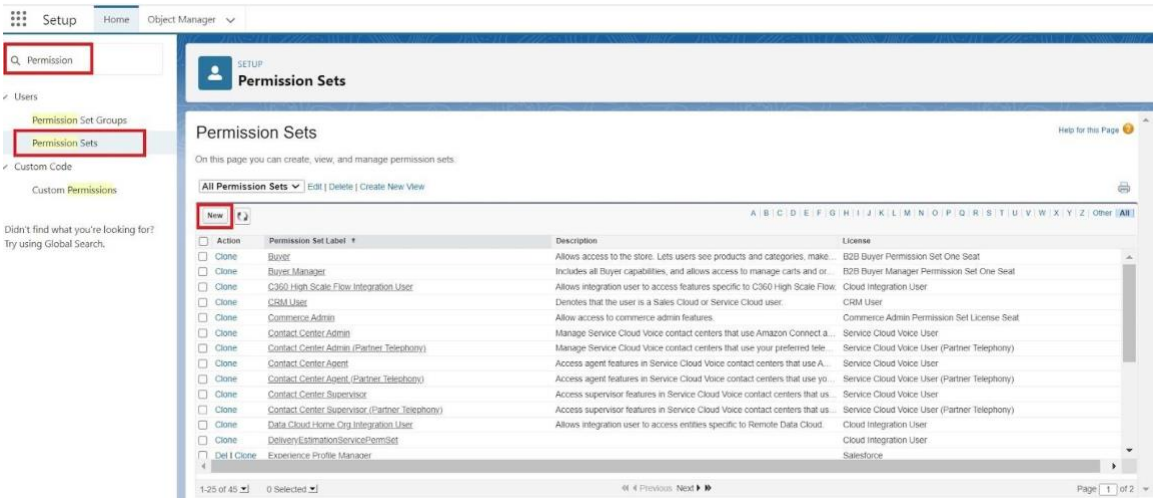
Permission Sets in Salesforce are a powerful tool to extend user permissions beyond what is defined in their profiles. They allow administrators to grant additional access to various tools and functions without altering the user's profile. Permission sets are particularly useful for providing specialized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

Activity 1 : Create a Permission Set.

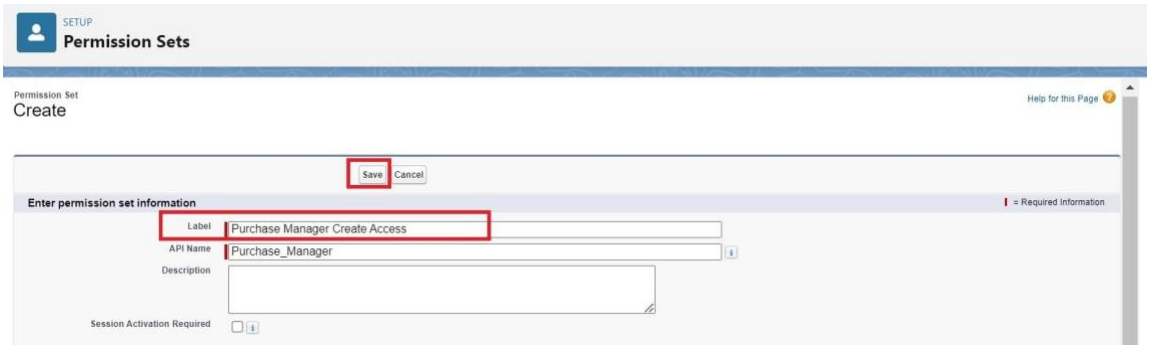
Duration: 0.1 Hrs

Skill Tags:

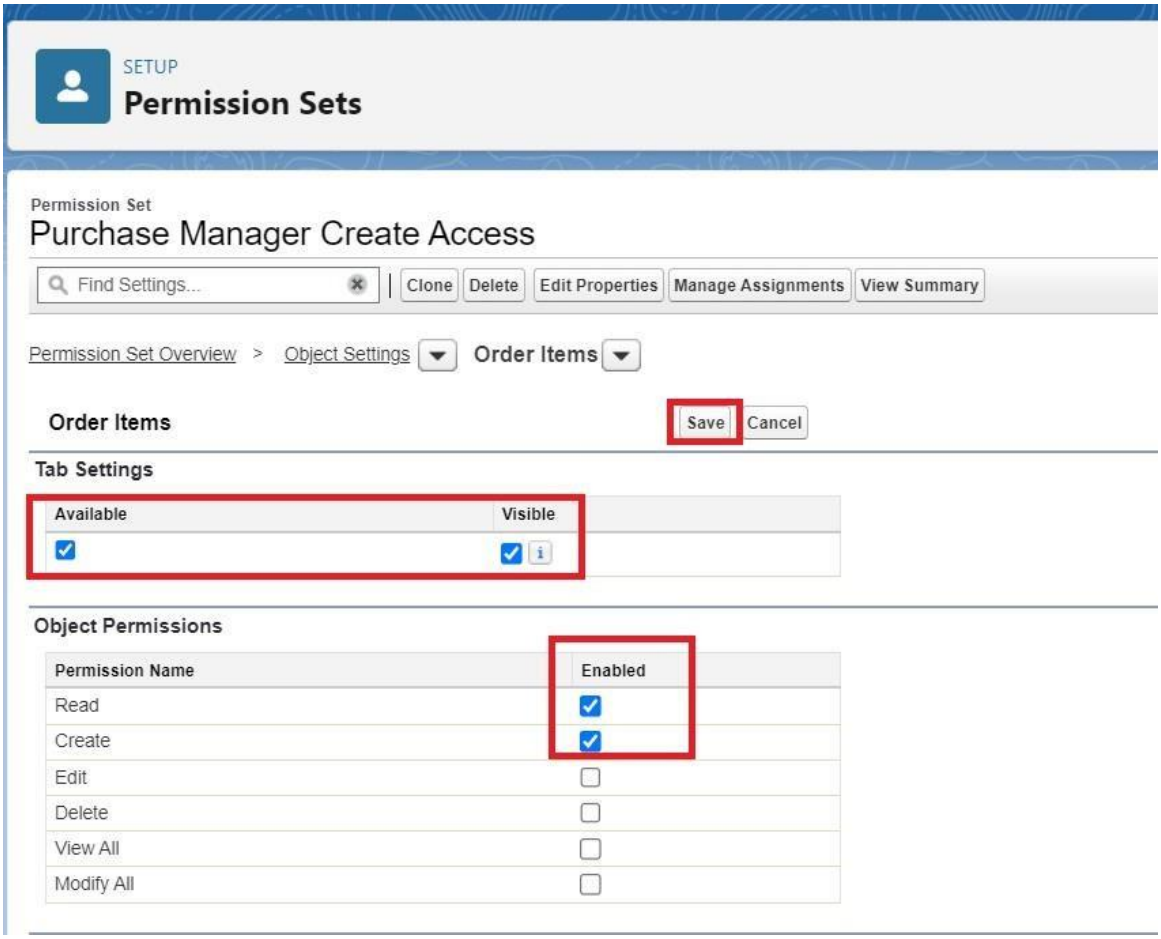
1. Go to setup >> type Permission in quick find box >> Select Permission Set >> click on New.



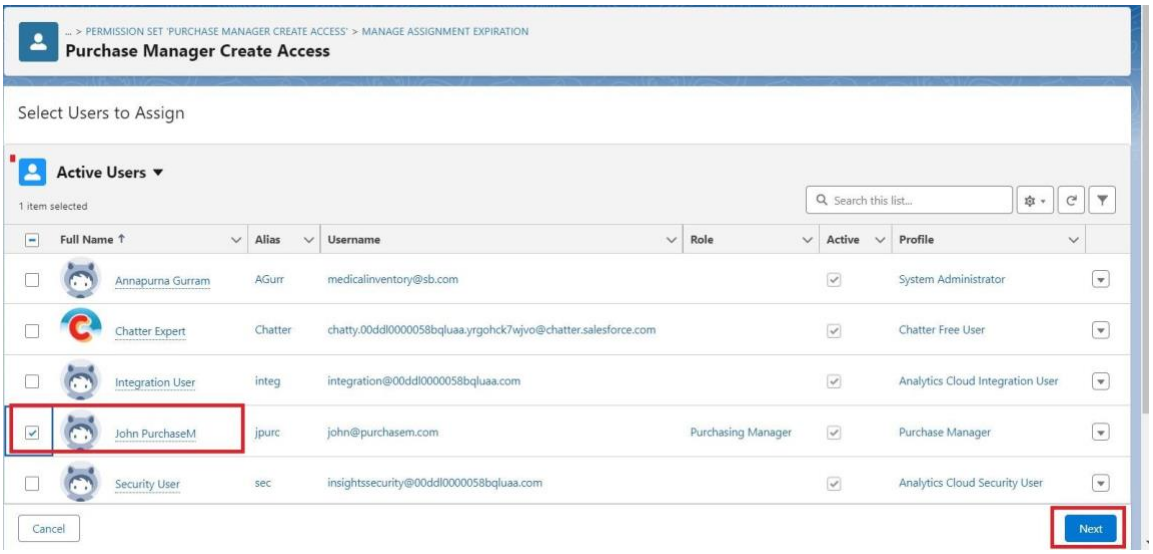
2. Enter Label as Purchase Manager Create Access >> Click on Save.



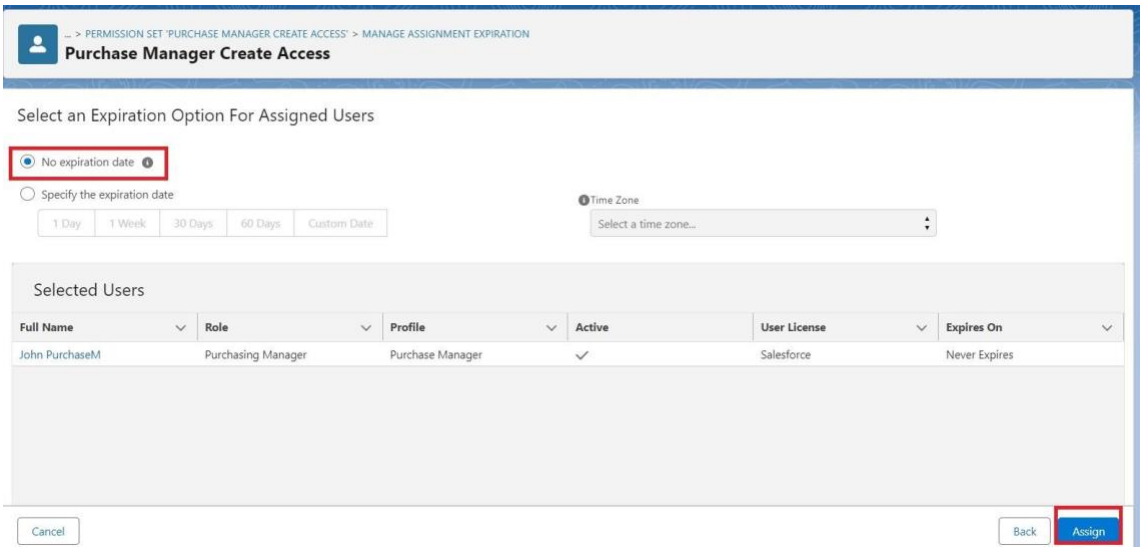
3. From Object Settings >> Select Order Item >> Enable for both Tab Available and Visible >> Enable Read and Create in Object Permissions >> Click on Save.



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.



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



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

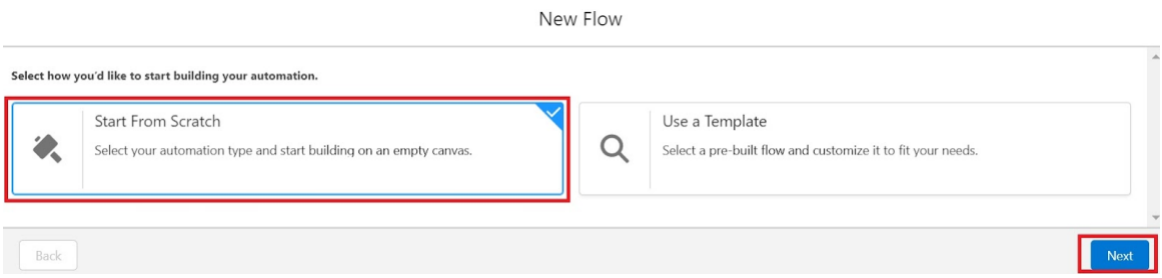
can be used to automate business processes, guide users through tasks, and integrate with external systems. They are highly versatile and can be configured to meet a wide range of business requirements without the need for custom code.

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

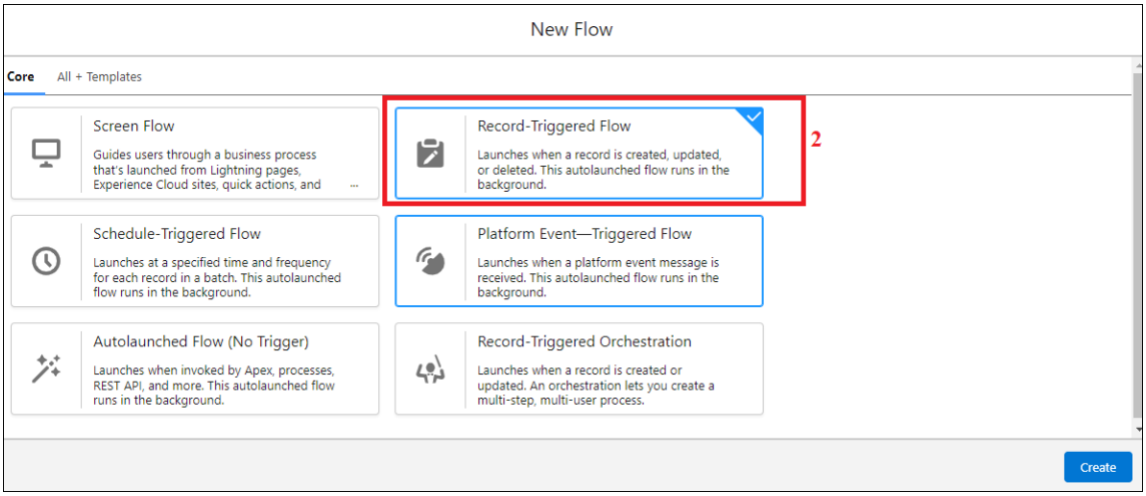
Duration: 0.2 Hrs

Skill Tags:

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

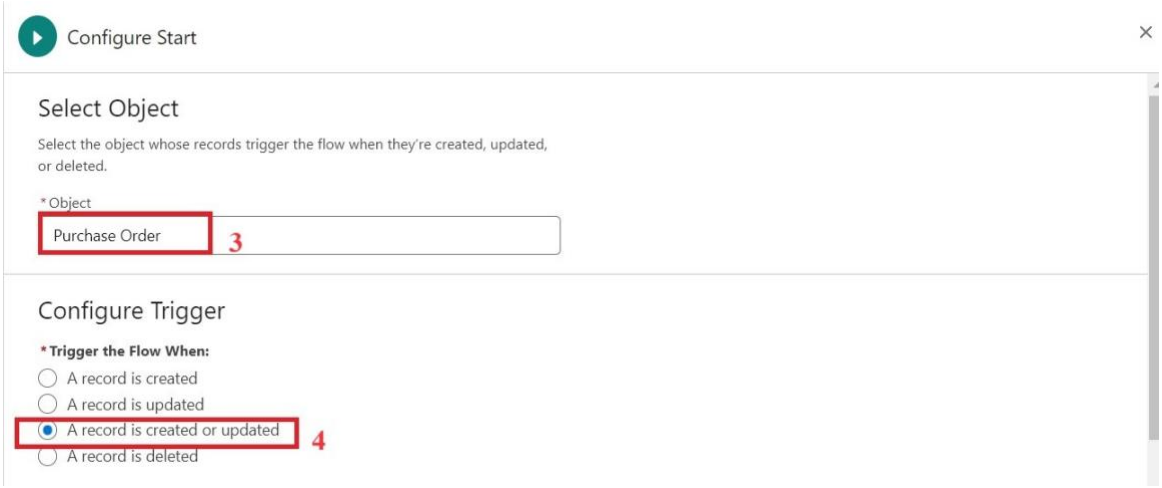


2. Select the record Triggered flow.Click on create.



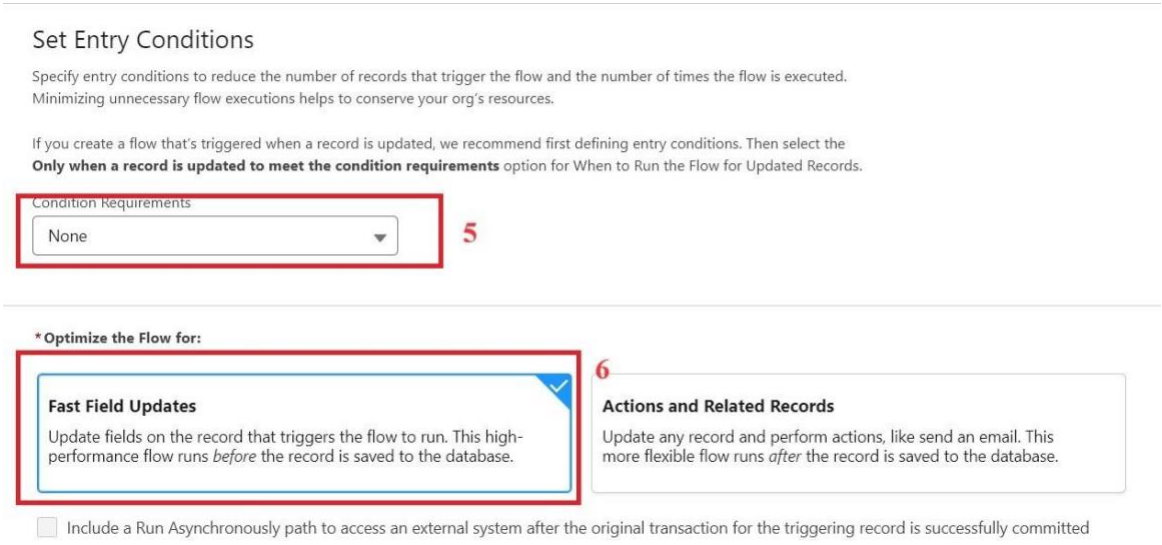
3. Under Object select Purchase Order

4. Select A record is created or updated



5. Set Entry Conditions : None

6. Select Fast Field Updates and click on Done



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.

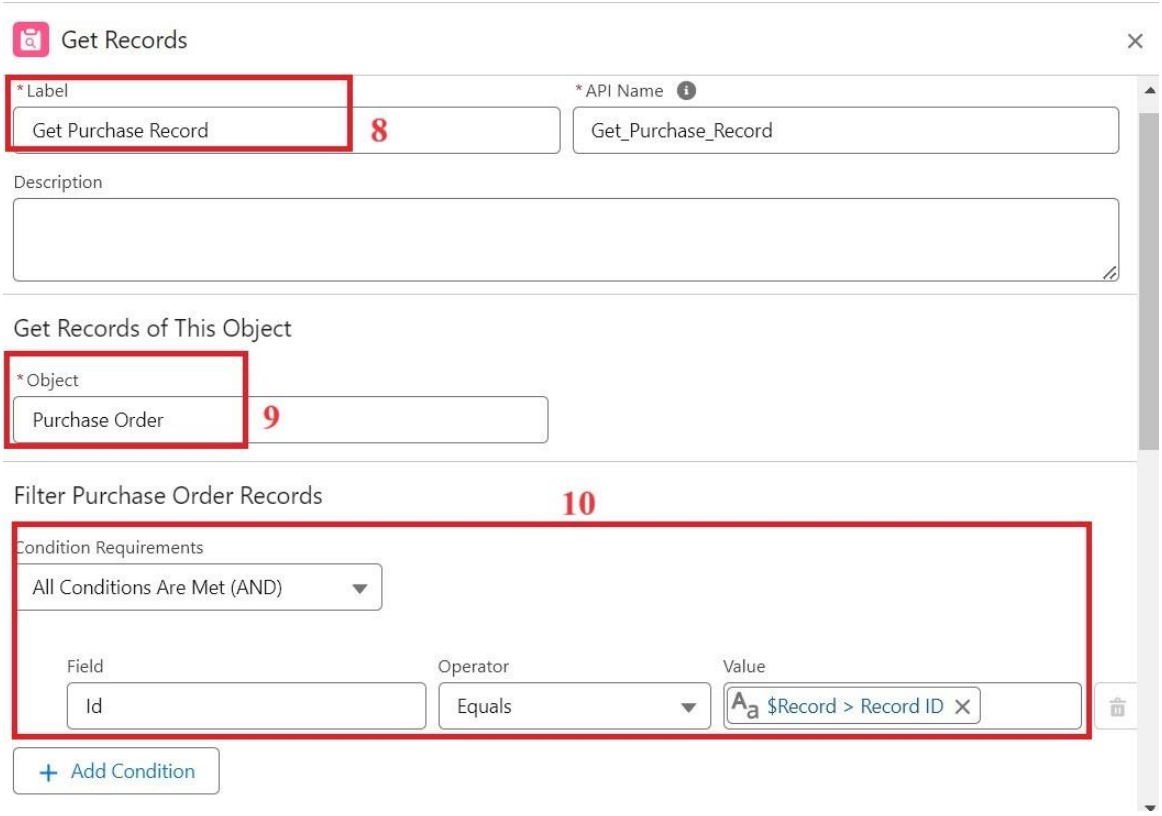
10. **For Condition Requirements , select All Conditions are Met(AND)**

For the first condition select as follows:

Field: Id

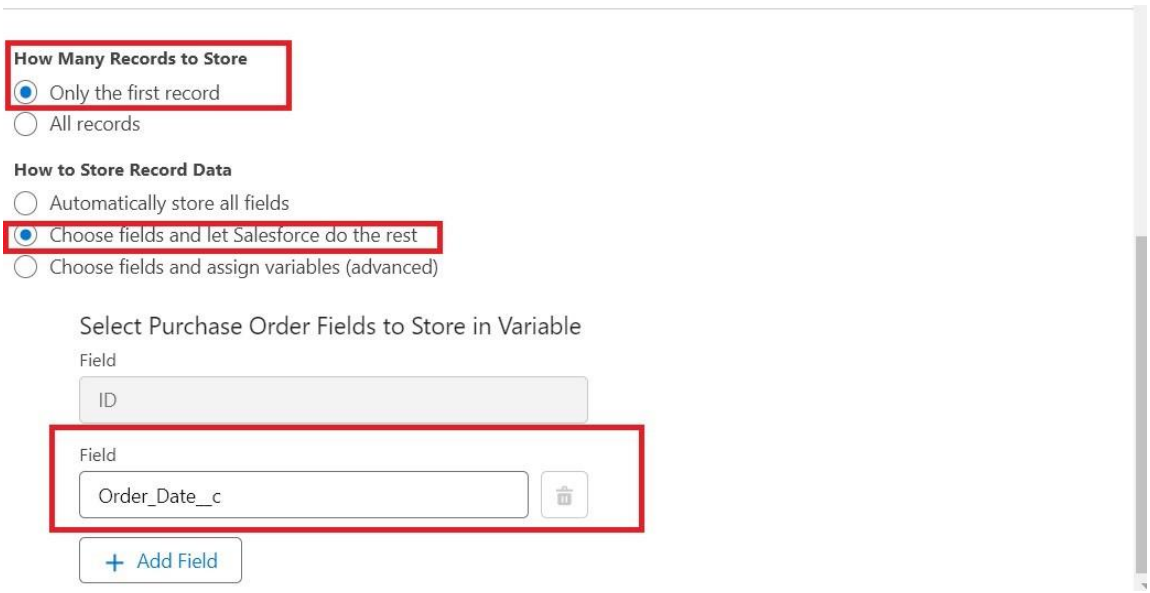
Operator: Equals

Value: {!$Record.Id}



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.**



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}

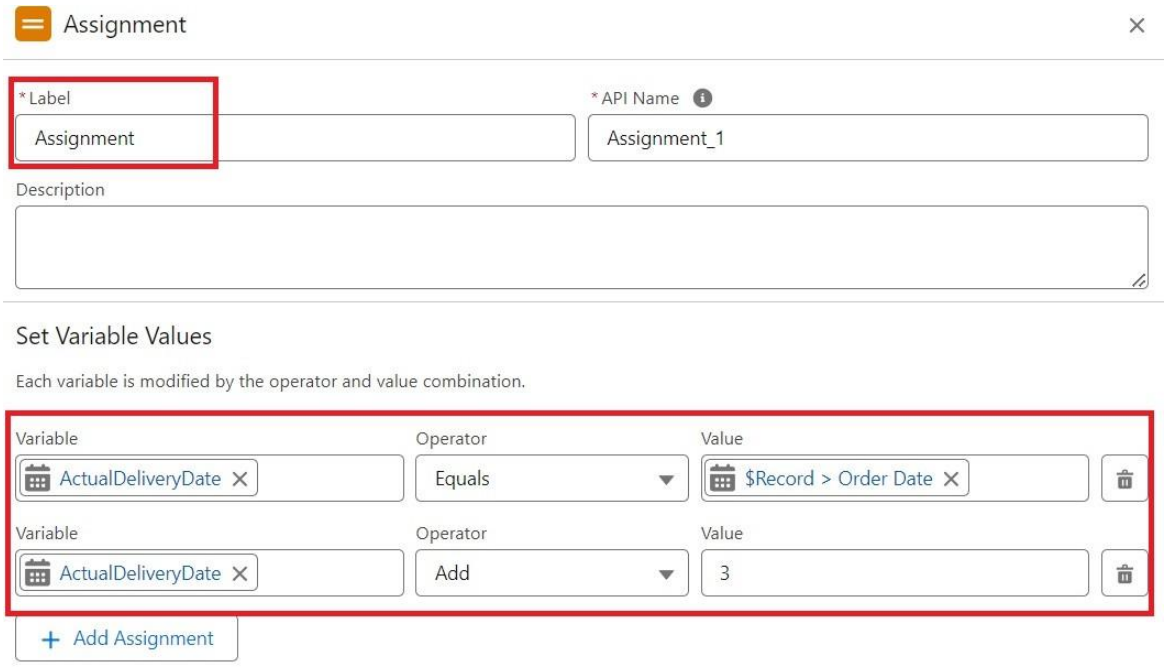
Operator : Equals

Value : {!$Record.Order_Date__c}

b) Variable : {!ActualDeliveryDate}

Operator : Add

Value : 3



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

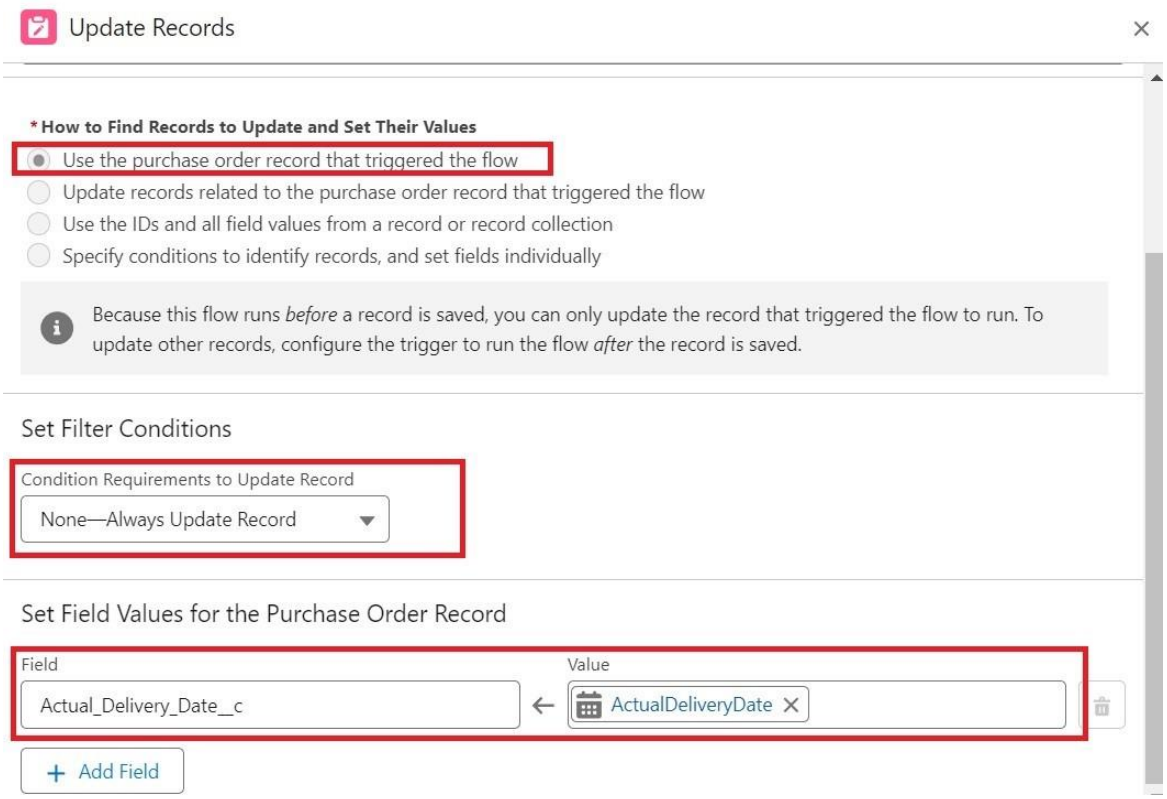
21. How to Find Records to Update and Set Their Values : Use the Purchase Order record that triggered the flow

22. Set Filter Conditions : None -Always Update Record

23. Set Field Values for the Trip Record as

Field : Actual_Delivery_Date__c

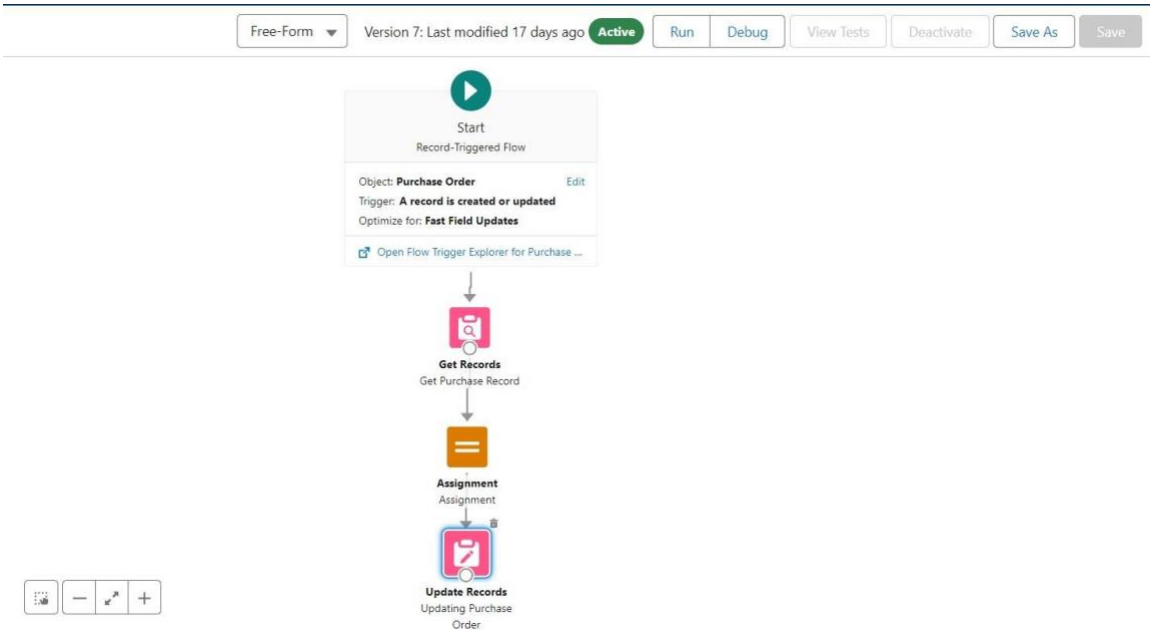
Value : {!ActualDeliveryDate}



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.**

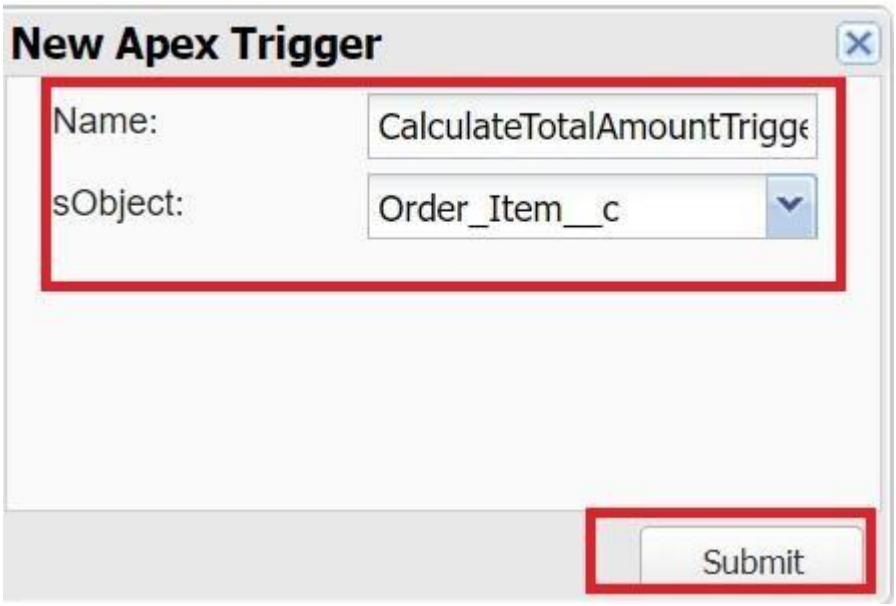
ii) **Click on Developer Console: Click on the "Developer Console" option from the Setup menu. This will open the Developer Console in a new browser tab or window.**

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

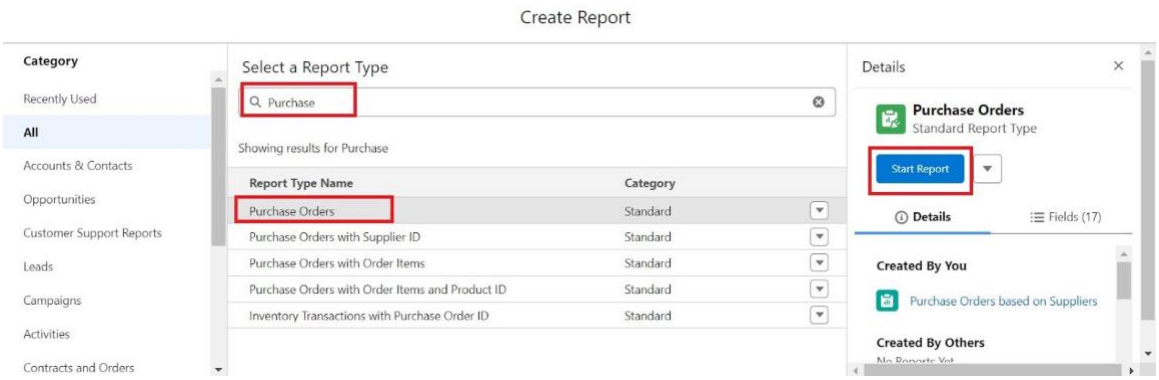
Skill Tags:

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

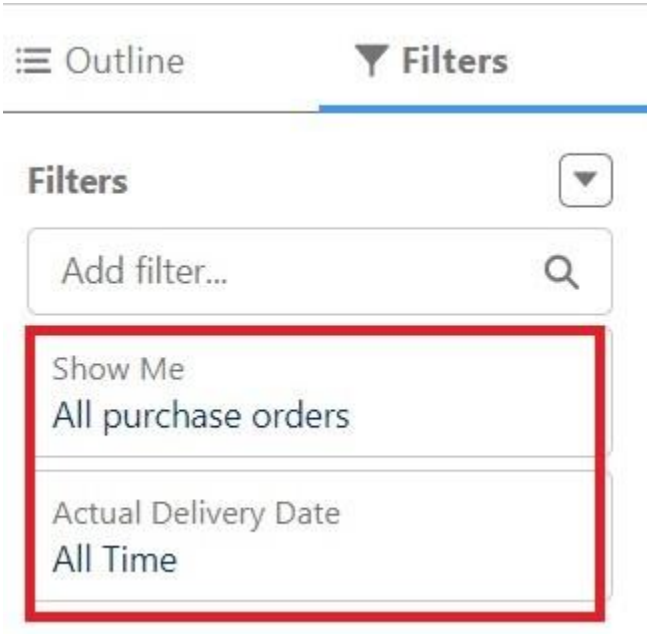
3. **Click on Reports tab**

4. **Click on New Report.**

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



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



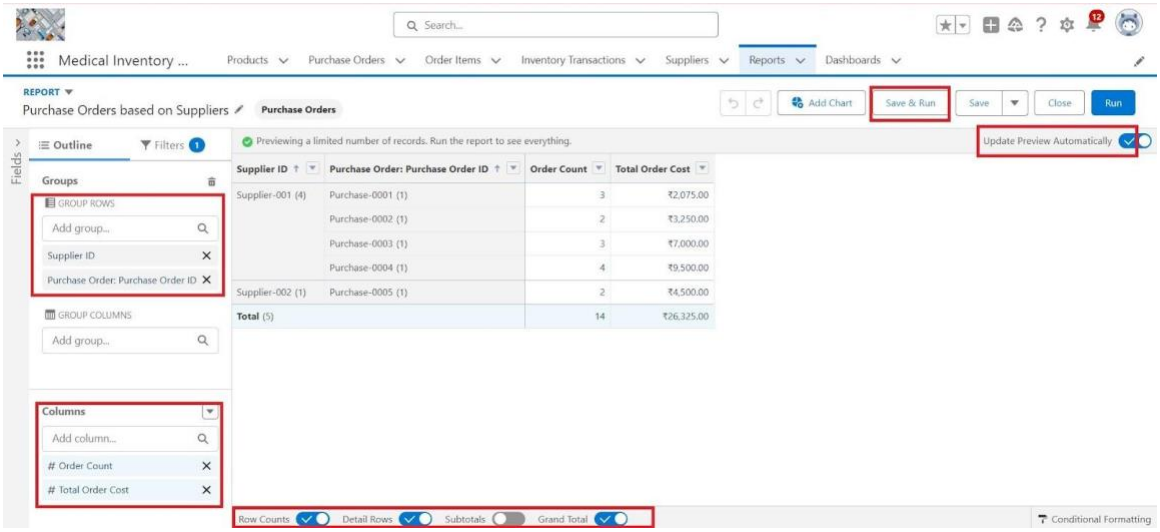
7. Customize your report, in group rows select –Supplier ID, Purchase Order: Purchase Order ID, for columns Order Count, Total Order Cost (In this way we are making a Summary Report).

8. **Click save and run**

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

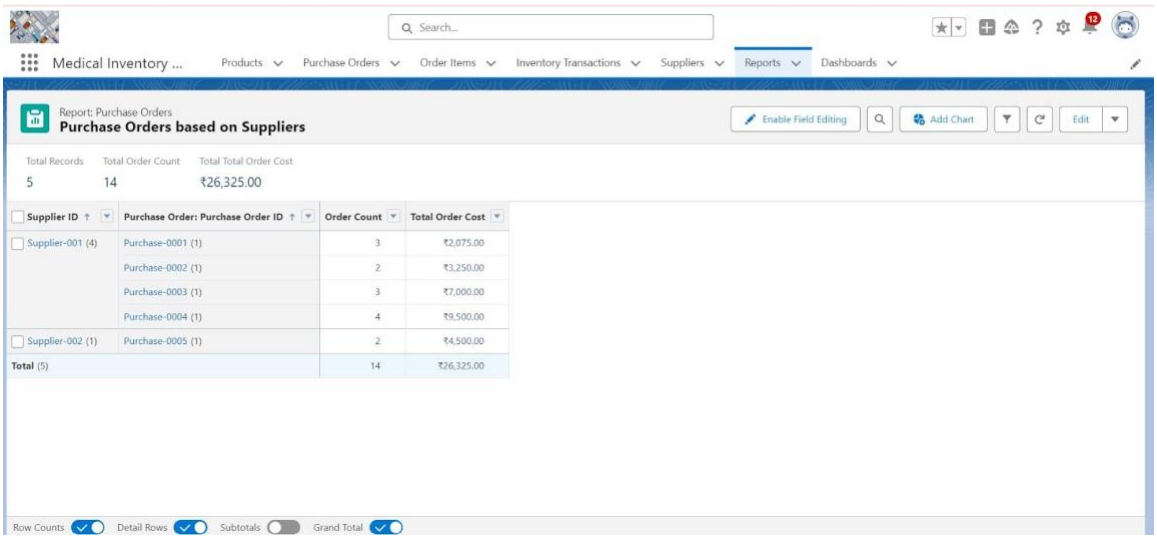
10. **Click Save**

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)



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.**

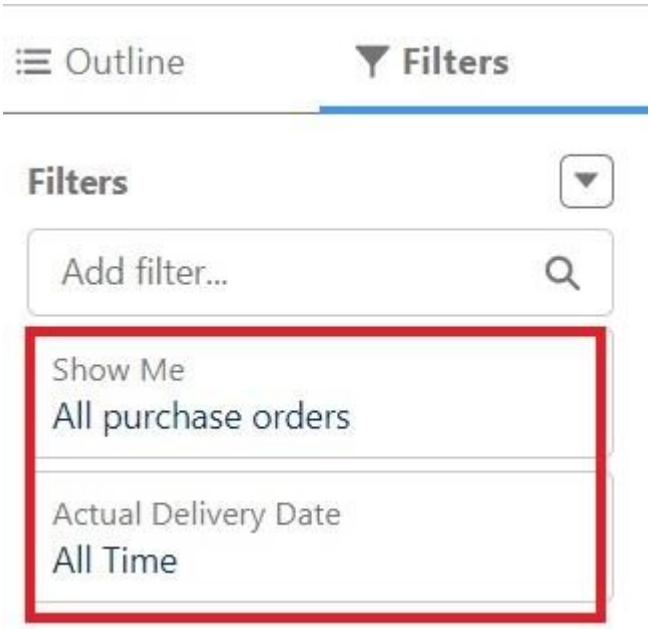


Activity 2: Create a Complete Purchase Details Report

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**

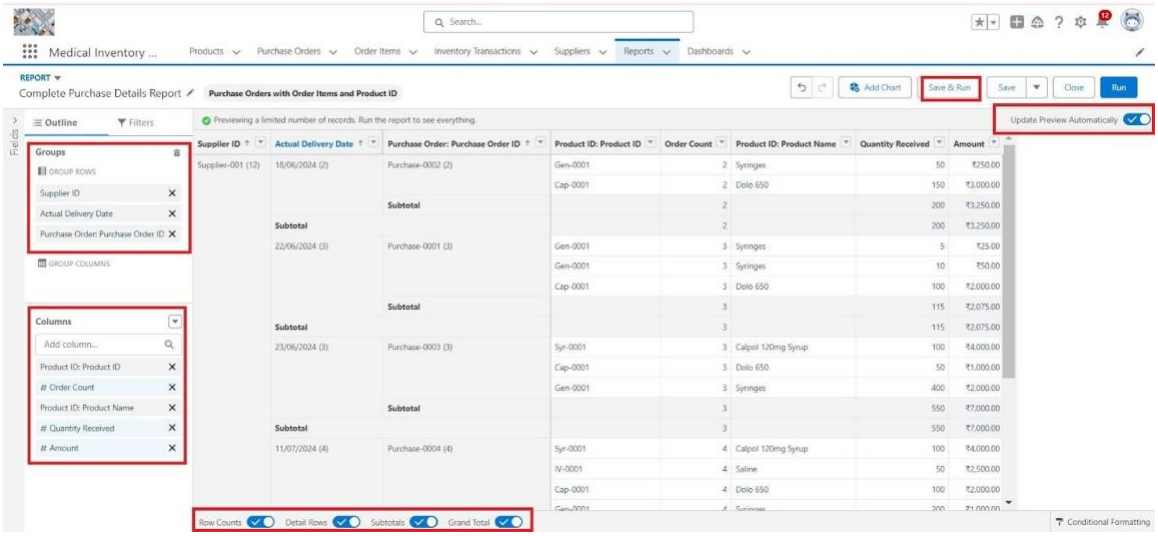


7. Customize your report, in group rows select –Supplier ID, Actual Delivery Date, Purchase Order: Purchase Order ID, for columns Product ID : Product ID, Product ID : Product Name, Order Count, Quantity Received, Amount (In this way we are making a Summary Report).

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

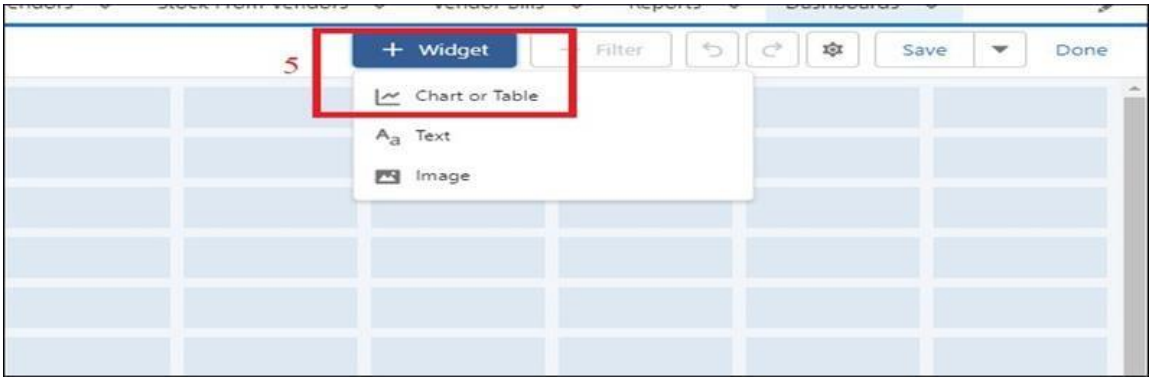
5. Click on +widget

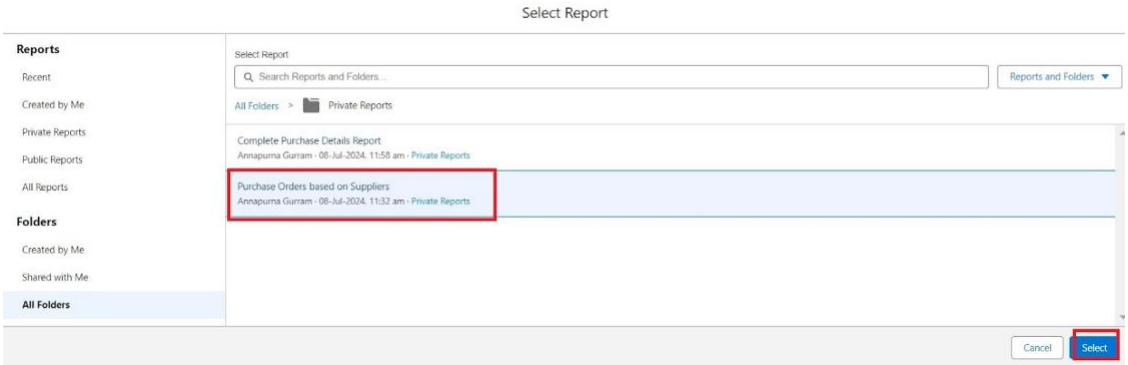
6. Select the Purchase Orders based on Suppliers Report

7. For the data visualization select any of the charts, tables etc. as per your choice/requirement

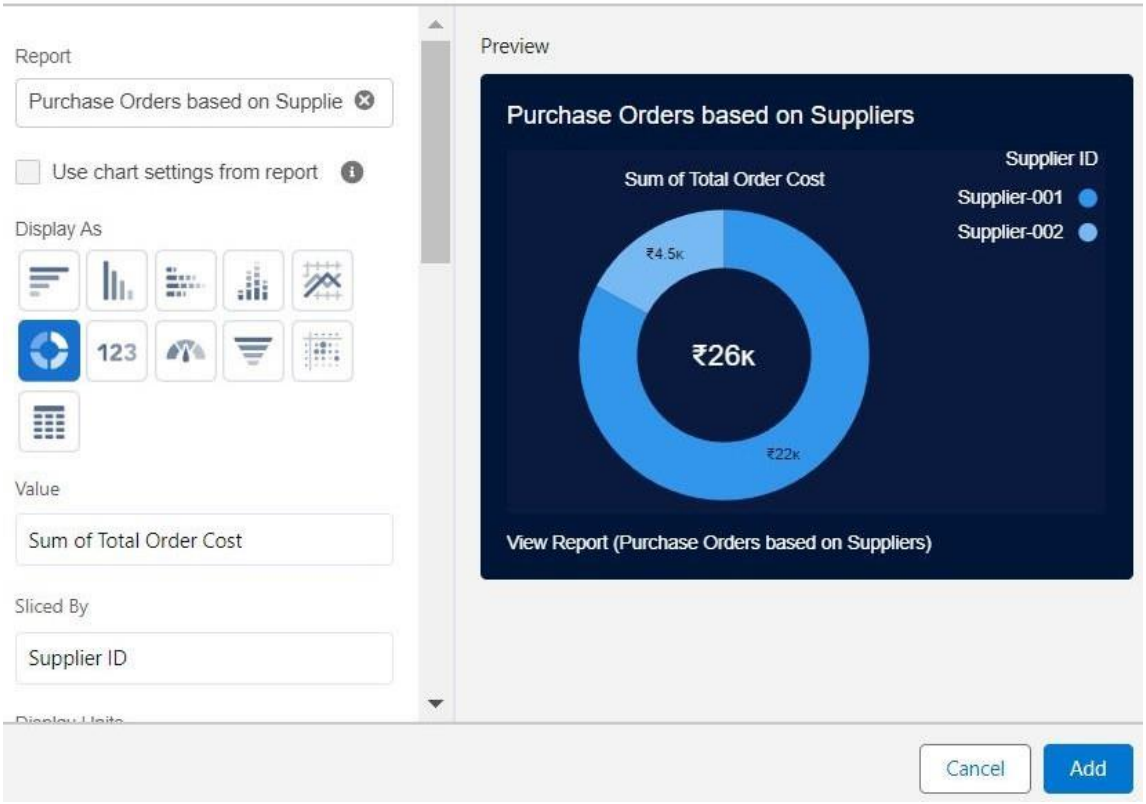
8. Click add.

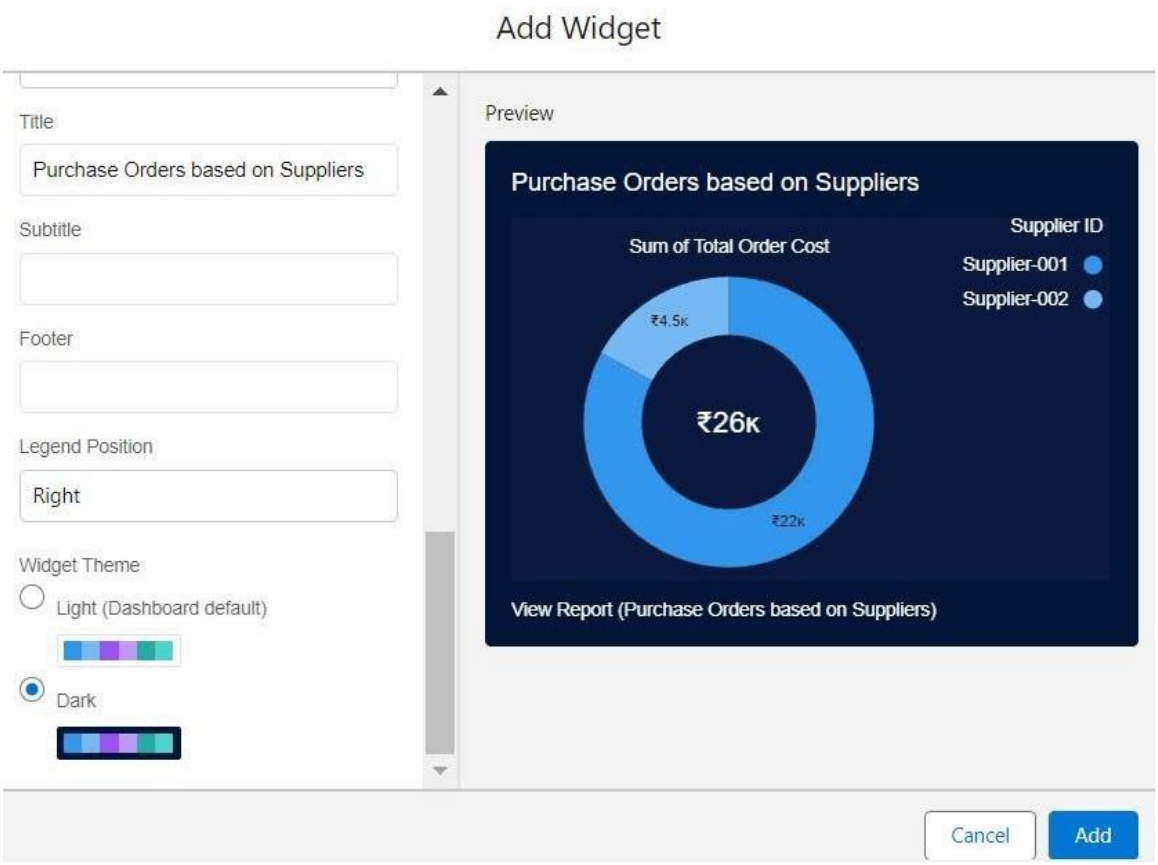
9. Click save.





Add Widget


Report
Purchase Orders based on Supplie
Use chart settings from report
Display As
123
Value
Sum of Total Order Cost
Sliced By
Supplier ID
Preview
Purchase Orders based on Suppliers
Sum of Total Order Cost
Supplier ID
Supplier-001
Supplier-002
₹4.5K
₹26K
₹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