

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/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/signup> On the sign up form, enter the following

2. details :

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

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

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

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

First Name*
Your first name

Last Name*
Your last name

Email*
Your email address

Role*
Your job role

Company*
Company Name

1. First name & Last name

2. Email

3. Role : Developer

4. Company : College Name

5. Country : India

6. Postal Code : pin code

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

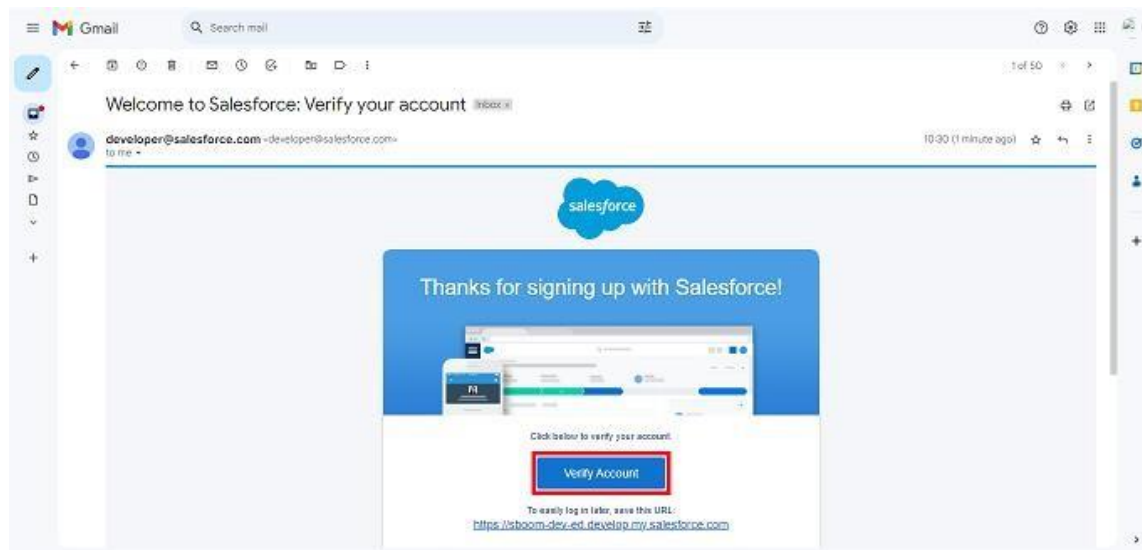
This need not be an actual email id, you can give anything in the format :
username@organization.com

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.com**.
Make sure to include at least:

- 8 characters
- 1 letter
- 1 number

* New Password

Good

* Confirm New Password

Match

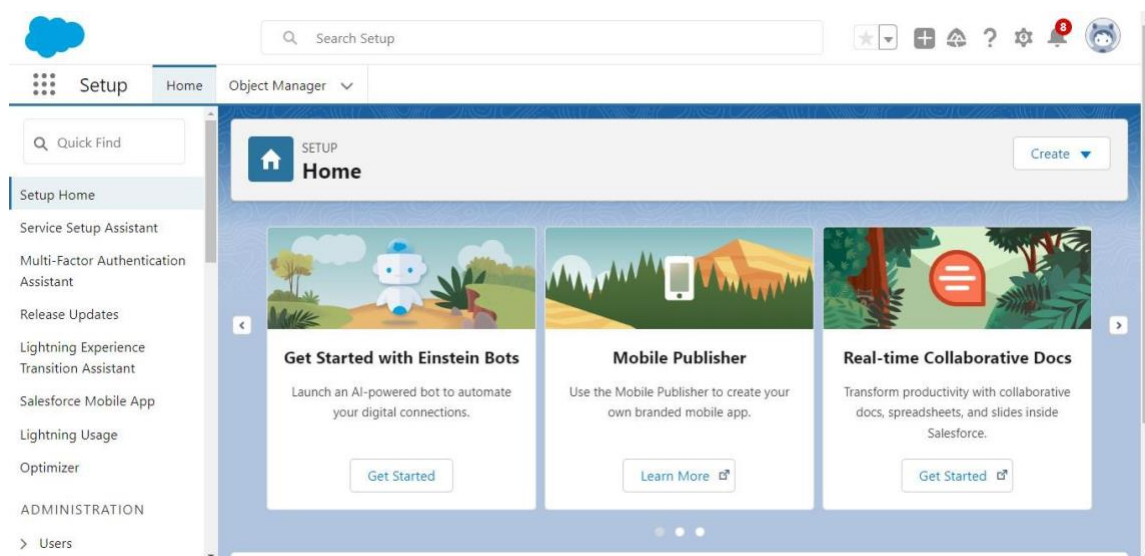
Security Question

▼ In what city were you born?

* Answer

Change Password

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



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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What Is Salesforce?

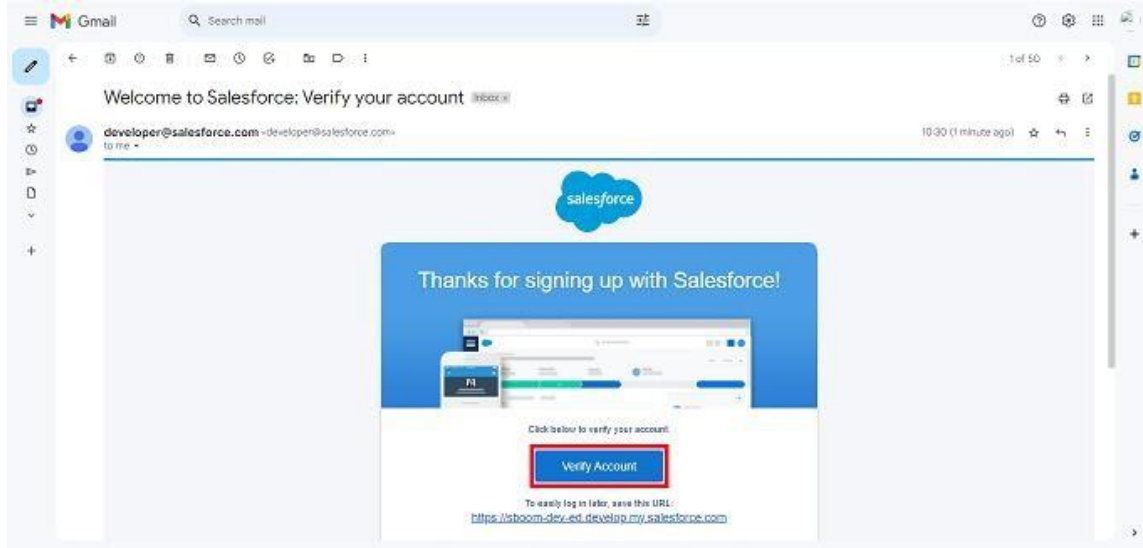
Salesforce is your customer success platform, designed to help you sell, service, market, analyze, and connect with your customers.

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.

Change Your Password

Enter a new password for **lead@sb.com**.
Make sure to include at least:

- 8 characters
- 1 letter
- 1 number

* New Password

Good

* Confirm New Password

Match

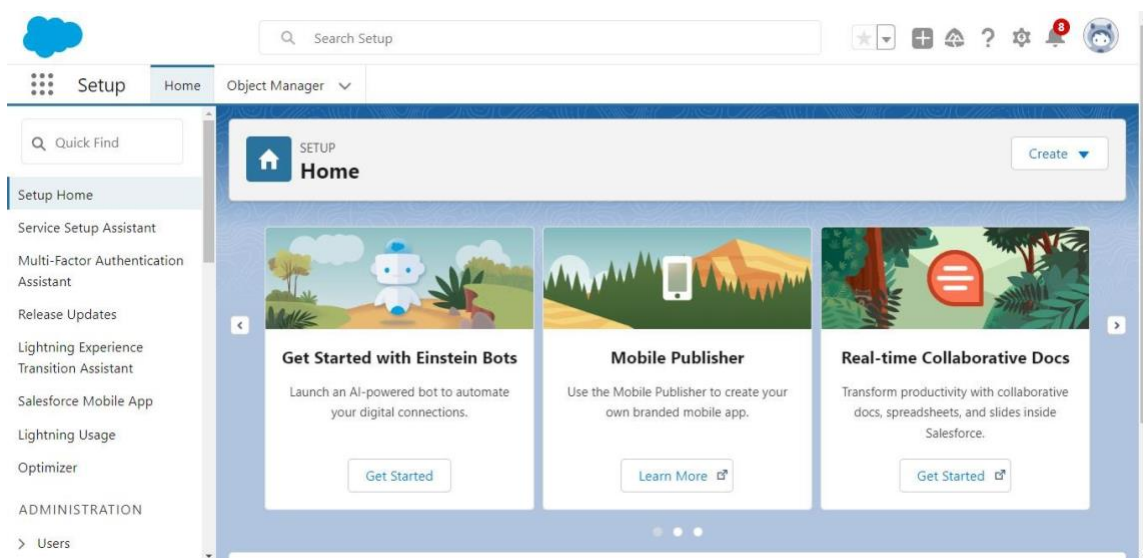
Security Question

▼ In what city were you born?

* Answer

Change Password

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



Milestone 3- Tabs

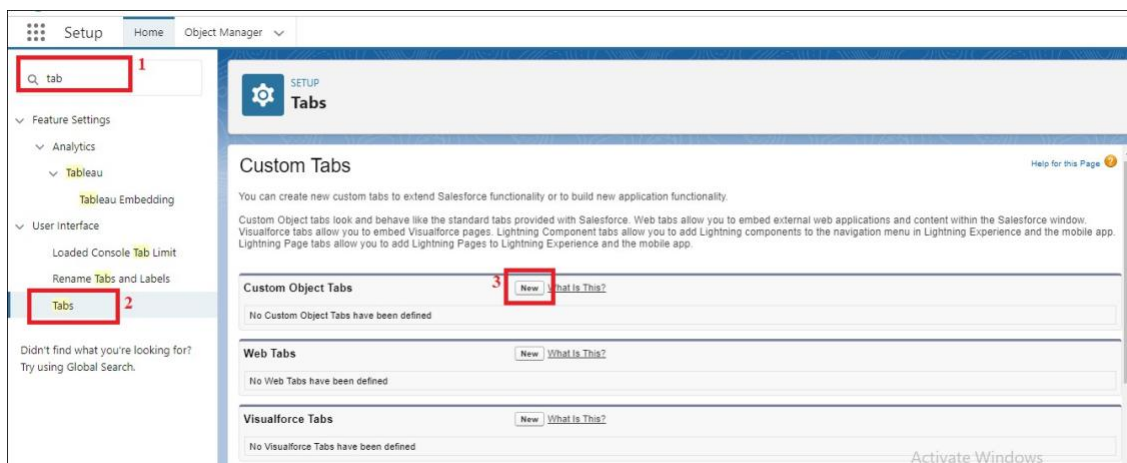
In Salesforce, tabs are used to make the data stored in objects accessible to users through the user interface. Tabs are a fundamental part of the Salesforce interface, providing a way to navigate to different objects and records.

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



SETUP
Tabs

Step 1. Enter the Details Step 1 of 3

Choose the custom object for this new custom tab. Fill in other details.

Select an existing custom object or create a new one.

Object: **Product**

Tab Style: **Stethoscope**

(Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab.

Splash Page Custom Link: **--None--**

Enter a short description.

Description:

Next Cancel

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

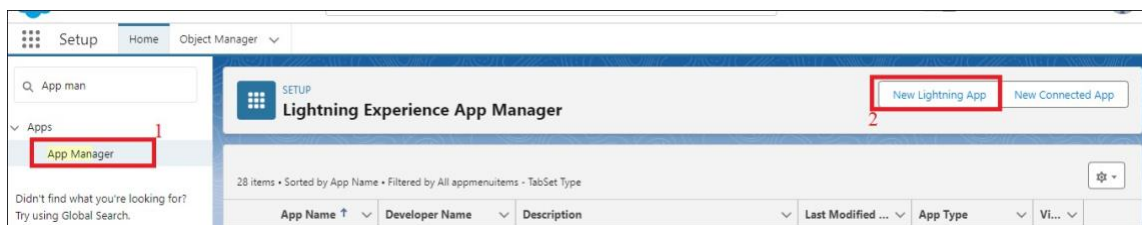
In Salesforce, tabs are used to make the data stored in objects accessible to users through the user interface. Tabs are a fundamental part of the Salesforce interface, providing a way to navigate to different objects and records.

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 ⓘ

Medical Inventory Management

* Developer Name ⓘ

Medical_Inventory_Management

Description ⓘ

Enter a description...

App Branding

Image ⓘ 3

Primary Color Hex Value ⓘ

#0070D2

Clear

Org Theme Options

☐ Use the app's image and color instead of the org's custom theme

App 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

Search

Dash

Dashboards

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

Search

system

System Administrator

Selected Profiles

Back

8

Save & Finish

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.

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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.

The screenshot displays the 'Lightning Experience App Manager' interface. In the top navigation bar, the 'Setup' tab is active. On the left sidebar, the 'Apps' section is expanded, and 'App Manager' is highlighted. The main content area shows a list of 28 items, sorted by App Name. A red box labeled '2' highlights the 'New Lightning App' button in the top right corner. Below this, the 'New Lightning App' form is shown. The form is divided into two sections: 'App Details' and 'App Branding'. In the 'App Details' section, the 'App Name' field is highlighted with a red box labeled '3' and contains the text 'Medical Inventory Management'. The 'Developer Name' field contains 'Medical_Inventory_Management' and the 'Description' field is empty. In the 'App Branding' section, the 'Image' field is highlighted with a red box labeled '3' and contains a medical-themed icon. The 'Primary Color Hex' field contains the value '#0070D2'. At the bottom right of the form, a 'Next' button is highlighted with a red box.

Setup Home Object Manager

App Manager

Lightning Experience App Manager

New Lightning App New Connected App

28 items • Sorted by App Name • Filtered by All appmenuitems • TabSet Type

App Name Developer Name Description Last Modified ... App Type Vi...

New Lightning App

App Details

3 * App Name 1 Medical Inventory Management

* Developer Name 1 Medical_Inventory_Management

Description 1 Enter a description...

App Branding

Image 1 3

Primary Color Hex Value 1 #0070D2

Org Theme Options

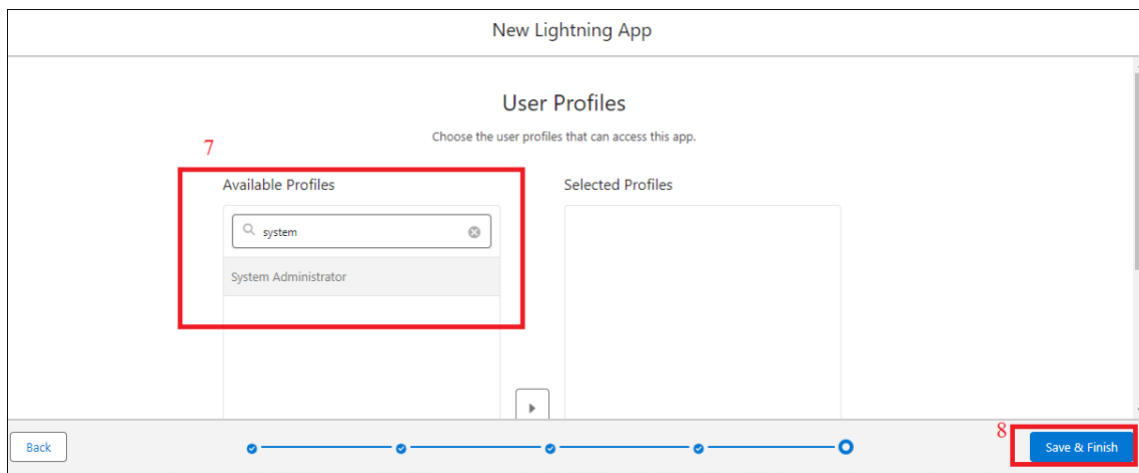
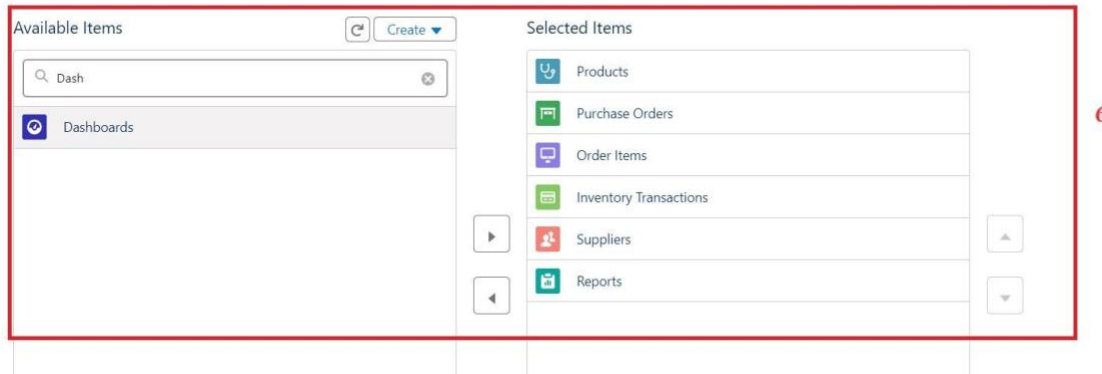
☐ Use the app's image and color instead of the org's custom theme

App 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.



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 Setup interface. At the top, there is a navigation bar with 'Setup', 'Home', and 'Object Manager' (labeled '2'). A search bar is also present. In the top right corner, a gear icon is labeled '1'. Below the navigation bar, the 'Object Manager' section is displayed, showing a list of objects. The 'Product' object is highlighted with a red box and labeled '3'. The table below shows the following data:

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

SETUP > OBJECT MANAGER

Product

Details

Fields & Relationships 4 Items, Sorted by Field Label

Quick Find New Deleted Fields Field Dependencies Set History Tracking

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)		✓

Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts

☐ Geolocation
☐ Number
☐ Percent
☐ Phone
☐ Picklist
☐ Picklist (Multi-Select)
☒ **Text** 6
☐ Text Area
☐ Text Area (Long)
☐ Text Area (Rich)
☐ Text (Encrypted)
☐ Time
☐ URL

clicking Send an Email. Note that custom email addresses cannot be used for mass emails.
 Allows users to define locations. Includes latitude and longitude components, and can be used to calculate distance.
 Allows users to enter any number. Leading zeros are removed.
 Allows users to enter a percentage number, for example, '10' and automatically adds the percent sign to the number.
 Allows users to enter any phone number. Automatically formats it as a phone number.
 Allows users to select a value from a list you define.
 Allows users to select multiple values from a list you define.
 Allows users to enter any combination of letters and numbers.
 Allows users to enter up to 255 characters on separate lines.
 Allows users to enter up to 131,072 characters on separate lines.
 Allows users to enter formatted text, add images and links. Up to 131,072 characters on separate lines.
 Allows users to enter any combination of letters and numbers and store them in encrypted form.
 Allows users to enter a local time. For example, "2:40 PM", "14:40", "14:40:00", and "14:40:50.600" are all valid times for this field.
 Allows users to enter any valid website address. When users click on the field, the URL will open in a separate browser window.

Next Cancel

Step 2 of 4

Previous **Next** Cancel

Field Label **Product Name** 7

Please enter the maximum length for a text field below.

Length **255**

Field Name **Product** 7

Description

Help Text

Required ☒ Always require a value in this field in order to save a record 8

☐ Unique ☐ Do not allow duplicate values
☒ Treat "ABC" and "abc" as duplicate values (case insensitive)
☐ Treat "ABC" and "abc" as different values (case sensitive)

☐ 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

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.

The screenshot shows the Salesforce field type selection interface. On the left, a list of field types is displayed with radio buttons. The 'Text Area' option is selected and highlighted with a red box, with a red number 6 next to it. The other field types listed are Geolocation, Number, Percent, Phone, Picklist, Picklist (Multi-Select), Text, Text Area (Long), Text Area (Rich), Text (Encrypted), Time, and URL. On the right, a description for each field type is provided. At the bottom right, the 'Next' button is highlighted with a red box, and the 'Cancel' button is visible next to it.

Field Type	Description
<input type="radio"/> Geolocation	clicking Send an Email. Note that custom email addresses cannot be used for mass emails. Allows users to define locations. Includes latitude and longitude components, and can be used to calculate distance.
<input type="radio"/> Number	Allows users to enter any number. Leading zeros are removed.
<input type="radio"/> Percent	Allows users to enter a percentage number, for example, '10' and automatically adds the percent sign to the number.
<input type="radio"/> Phone	Allows users to enter any phone number. Automatically formats it as a phone number.
<input type="radio"/> Picklist	Allows users to select a value from a list you define.
<input type="radio"/> Picklist (Multi-Select)	Allows users to select multiple values from a list you define.
<input type="radio"/> Text	Allows users to enter any combination of letters and numbers.
<input checked="" type="radio"/> Text Area	Allows users to enter up to 255 characters on separate lines.
<input type="radio"/> Text Area (Long)	Allows users to enter up to 131,072 characters on separate lines.
<input type="radio"/> Text Area (Rich)	Allows users to enter formatted text, add images and links. Up to 131,072 characters on separate lines.
<input type="radio"/> Text (Encrypted)	Allows users to enter any combination of letters and numbers and store them in encrypted form.
<input type="radio"/> Time	Allows users to enter a local time. For example, "2:40 PM", "14:40", "14:40:00", and "14:40:50.600" are all valid times for this field.
<input type="radio"/> URL	Allows users to enter any valid website address. When users click on the field, the URL will open in a separate browser window.

Next Cancel

Step 2. Enter the details Step 2 of 4

Previous **Next** Cancel

Field Label 7

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 8

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

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

Previous **Next** Cancel

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".

Length 6 Decimal Places 7

Number of digits to the left of the decimal point Number of digits to the right of the decimal point

Field Name

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

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

Previous **Next** Cancel

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". 8

Length 6 Decimal Places 8

Number of digits to the left of the decimal point Number of digits to the right of the decimal point

Field Name 1

Description

Help Text 1

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 1

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.

Specify the type of information that the custom field will contain.

Data Type

Select one of the data types below:

- ☐ None Selected
- ☐ Auto Number
- ☐ Formula
- ☐ Roll-Up Summary
- ☒ **Lookup Relationship**
- ☐ Master-Detail Relationship
- ☐ External Lookup Relationship

Lookup Relationship (highlighted with red box and number 4): 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.

Master-Detail Relationship: Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where:

- The relationship field is required on all detail records.
- The ownership and sharing of a detail record are determined by the master record.
- When a user deletes the master record, all detail records are deleted.
- You can create rollup summary fields on the master record to summarize the detail records.

The relationship field allows users to click on a lookup icon to select a value from a popup list. The master object is the source of the values in the list.

External Lookup Relationship: Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.

Next (highlighted with red box)

Purchase Order

New Relationship

Help for this Page

Step 2. Choose the related object

Select the other object to which this object is related.

Related To (highlighted with red box and number 5): **Supplier**

Next (highlighted with red box and number 6)

Field Label (highlighted with red box and number 7): **Supplier ID**

Field Name: **Supplier_ID**

Description

Help Text

Child Relationship Name (highlighted with red box and number 8): **Purchase Orders**

Required (checked): **Always require a value in this field in order to save a record** (highlighted with red box and number 8)

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.

Auto add to custom report type (checked): **Add this field to existing custom report types that contain this entity**

Next (highlighted with red box and number 9)

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.

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: \$CustomMetadata.Type__mdt.RecordAPIName.Field__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
- ☐ Formula
- ☒ Roll-Up Summary

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

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.

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

Previous **Next** Cancel

Field Label

Field Name

Description

Help Text

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

Previous Next Cancel

Purchase Order
New Custom Field

Step 3. Define the summary calculation Step 3 of 5

Previous **Next** Cancel

Select Object to Summarize

Master Object Purchase Order

Summarized Object **Order Items** 6

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 Step 2 of 5

Field Label: **Unit Price** 5 Field Name: **Unit_Price**

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

Formula Return Type

☐ None Selected Select one of the data types below:

☐ Checkbox Calculate a boolean value
Example: `{TODAY()} > CloseDate`

☒ **Currency** 6 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

Order Item Help for this Page

New Custom Field

Step 3. Enter formula Step 3 of 5

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...](#)

Unit Price (Currency) = 7

Functions

-- All Function Categories --

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

Quick Tips 8

- Getting Started
- Operators & Functions

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.

Simple Formula Advanced Formula

Insert Field Insert Operator

Amount (Currency) =
Quantity_Received__c * Unit_Price__c

7

Functions
-- All Function Categories --
ABS
ACOS
ADDMONTHS
AND
ASCII
ASIN
Insert Selected Function

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

Previous Next Cancel

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 7

☐ Display values alphabetically, not in the order entered

☐ Use first value as default value 1

☒ Restrict picklist to the values defined in the value set 1

Field Name Transaction_Type

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

Step 2 of 4

Previous Next Cancel

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

Default Value Show Formula Editor

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

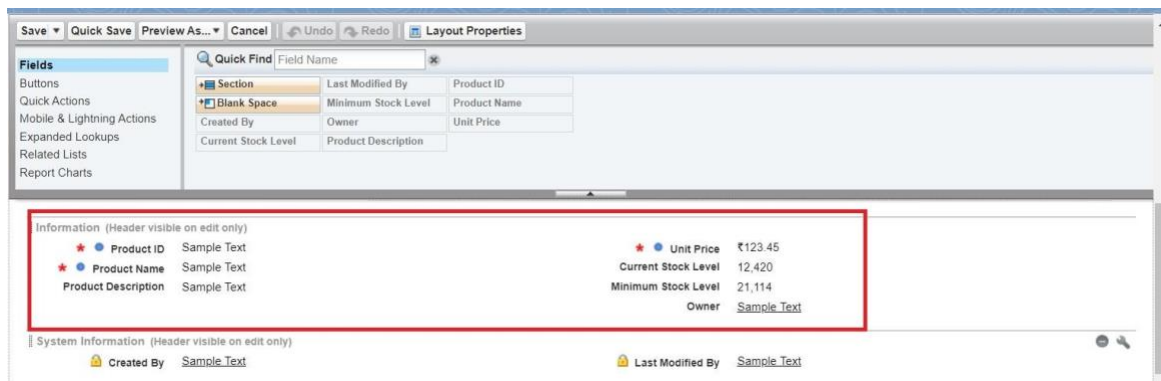
Activity 13: Creating a Email Field in Supplier object

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.



4. Click on Save.

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

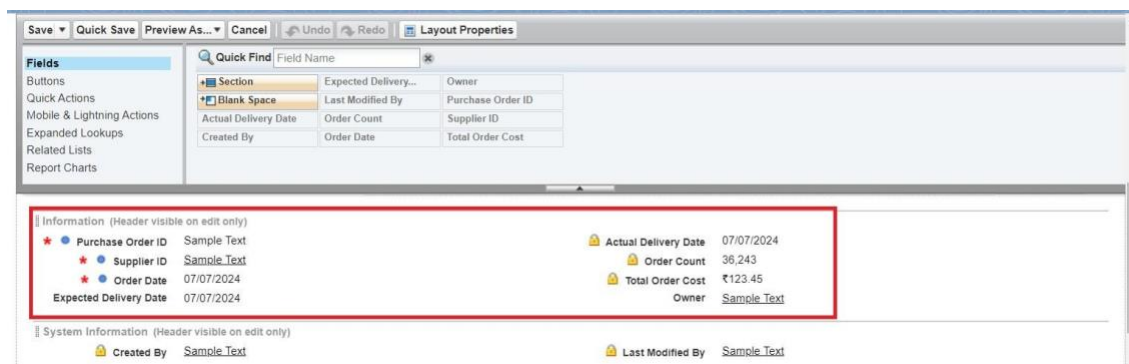
Duration: 0.05 Hrs

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

SETUP > OBJECT MANAGER
Order Item

Save Quick Save Preview As... Cancel Undo Redo Layout Properties

Quick Find Field Name

Fields

- Buttons
- Quick Actions
- Mobile & Lightning Actions
- Expanded Lookups
- Related Lists
- Report Charts

Section

Blank Space

Amount

Created By

Last Modified By

Order Item ID

Product ID

Purchase Order ID

Quantity Ordered

Quantity Received

Unit Price

Information (header visible on edit only)

Order Item ID Sample Text

Amount ₹123.45

Purchase Order ID Sample Text

Product details

Product ID Sample Text

Unit Price ₹123.45

Quantity Ordered 23,712

Quantity Received 33,407

System information (header visible on edit only)

Created By Sample Text

Last Modified By Sample Text

Custom Links (header visible on edit only)

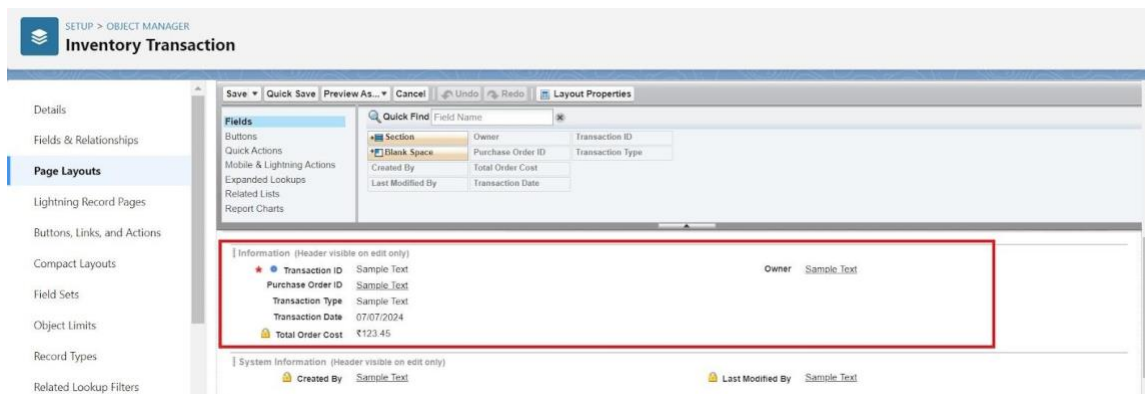
4. Click Save.

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

Supplier

Save Quick Save Preview As... Cancel Undo Redo Layout Properties

Fields

Quick Find: Field Name

Section Created By Phone Number

Blank Space Email Supplier ID

Address Last Modified By Supplier Name

Contact Person Owner

Report Charts

Information (Header visible on edit only)

Supplier ID Sample Text

Supplier Name Sample Text

Contact Person Sample Text

Phone Number 1-415-555-1212

Email sarah.sample@company.com

Address Sample Text

Owner Sample Text

System Information (Header visible on edit only)

Created By Sample Text

Last Modified By Sample Text

Custom Links (Header visible on edit only)

4.Click Save.

Milestone 6 -Editing of Page Layouts

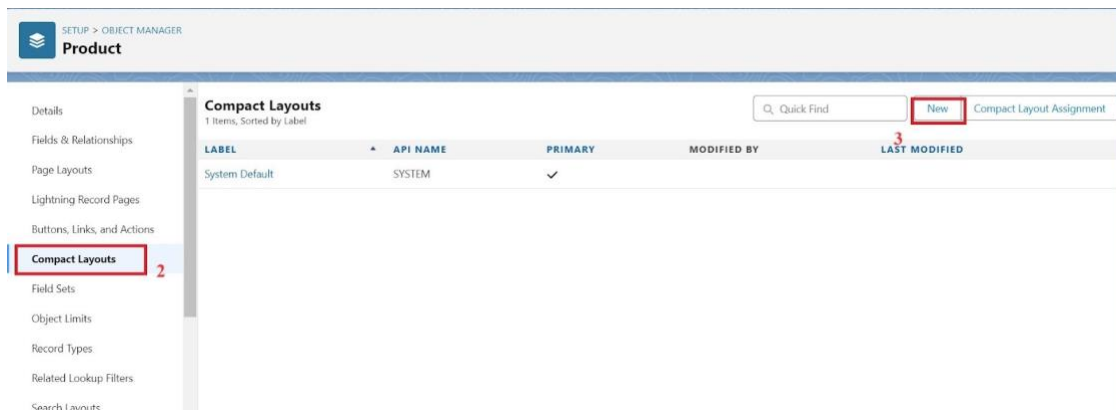
Page layouts in Salesforce are used to customize the organization, structure, and content of pages for viewing and editing records. They determine which fields, related lists, and custom links are visible to users, as well as the order and grouping of those elements.

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.



SETUP > OBJECT MANAGER

Product

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts 2

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

Compact Layouts
1 Item, Sorted by Label

Quick Find New Compact Layout Assignment

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

Enter Compact Layout Information ! = Required Information

Label: 4

Name:

Select Compact Layout Fields

Available Fields

- Created By
- Last Modified By
- Minimum Stock Level
- Owner
- Product ID

Selected Fields

- Product Name
- Unit Price
- Current Stock Level

5

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

6

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: 9

10

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.

The screenshot shows the 'Compact Layout Edit' dialog box. At the top, there are 'Save' and 'Cancel' buttons. Below is the 'Enter Compact Layout Information' section with a 'Label' field containing 'Purchase Order Compact L' (marked with a red box and number 4) and a 'Name' field containing 'Purchase_Order_Compact_'. The 'Select Compact Layout Fields' section contains two lists: 'Available Fields' (Actual Delivery Date, Created By, Expected Delivery Date, Last Modified By, Owner, Order Count) and 'Selected Fields' (Purchase Order ID, Order Date, Total Order Cost, Supplier ID). The 'Selected Fields' list has a red box around it with a red number 5. To the right of the 'Selected Fields' list are buttons for 'Top', 'Up', 'Down', and 'Bottom'. At the bottom of the dialog, there is a 'Save' button (marked with a red box and number 6) and a 'Cancel' button. A small note at the bottom reads: 'Use SHIFT + click to select adjacent fields. Use CTRL + click to select an assortment of fields.'

Purchase Order Compact Layouts

Compact Layout Assignment

The screenshot shows the 'Compact Layout Assignment' dialog box. At the top, there are 'Save' and 'Cancel' buttons. Below is the 'Primary Compact Layout' section. It contains the text: 'Select the compact layout to use when this object's records appear as list items in the mobile app.' Below this text is a dropdown menu labeled 'Primary Compact Layout:' with 'Purchase Order Compact Layout' selected (marked with a red box and number 9). At the bottom of the dialog, there are 'Save' and 'Cancel' buttons. A red number 10 is placed above the top 'Save' button.

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 : $(\text{Expected_Delivery_Date_c} - \text{Order_Date_c}) > 7$

Purchase Order Validation Rule Help for this Page

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: ☒ 4

Description:

Error Condition Formula Required Information

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

(Expected_Delivery_Date__c - Order_Date__c) > 7 5

Functions: -- All Function Categories --
 ABS
 ACOS
 ADDMONTHS
 AND
 ASCII
 ASIN

Quick Tips
 • [Operators & Functions](#)

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**.

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

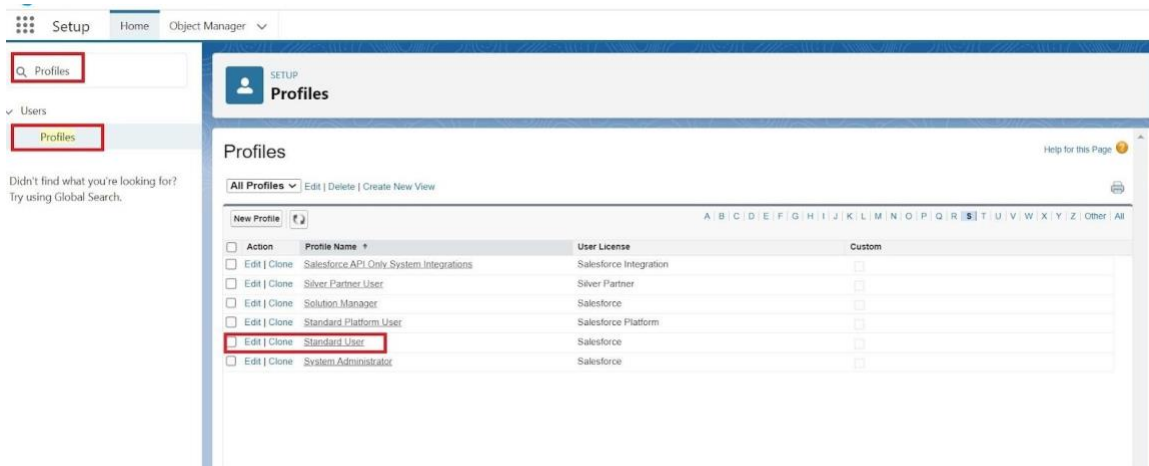
Profiles in Salesforce are fundamental to the platform's security model, defining what users can do within the organization. Profiles control a user's permissions to objects, fields, tabs, apps, and other settings. Each user in Salesforce must be assigned a profile, and the profile assigned to a user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



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	<input type="text" value="Inventory Manager"/>

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

Custom App Settings

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

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	Modify All
Inventory Transactions	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Order Items	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Products	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
Purchase Orders	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Suppliers	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

5. Change the password policies as mentioned :

6. User passwords expire in should be

7. Minimum password length should be , 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"/> ⓘ

Save 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

Set the permissions and page layouts for this profile.

Profile Edit Save Save & New Cancel

Name: User License: Salesforce Custom Profile: ☒

Description:

Custom App Settings Required Information

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

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	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"/>

	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
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:

Enforce password history:

Minimum password length:

Password complexity requirement:

Password question requirement:

Maximum invalid login attempts:

Lockout effective period:

Obscure secret answer for password resets: ☐

Require a minimum 1 day password lifetime: ☐

Don't immediately expire links in forgot password emails: ☐

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.

The screenshot shows the Salesforce Setup interface. In the left sidebar, the 'Roles' link is highlighted. The main content area is titled 'Understanding Roles' and shows a 'Territory-based Sample' role hierarchy diagram. The diagram illustrates a hierarchy starting with 'CEO, President, CFO, VP, Sales' at the top, branching into 'Western Sales Director', 'Eastern Sales Director', and 'International Sales Director'. Below these are various regional roles like 'CA Sales Rep', 'WA Sales Rep', 'UK Sales Rep', etc. A 'Set Up Roles' button is visible at the bottom right of the diagram area.

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.



Role Edit

New Role

Role Edit

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

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

roles

Users

Roles

Feature Settings

Sales

Contact Roles on Contracts

Contact Roles on Opportunities

Service

Case Teams

Case Team Roles

Contact Roles on Cases

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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

Executive Staff

CEO, President, CFO, VP, Roles

View & edit data, roll up forecasts, & generate reports for all users within reports. Can't access data of other Executive Staff.

Western Sales Director

Director of W. Sales

View & edit data, roll up forecasts, & generate reports for all users directly below. Can't access data of users above or of other staff.

Eastern Sales Director

Director of E. Sales

View & edit data, roll up forecasts, & generate reports for all users directly below. Can't access data of users above or of other staff.

International Sales Director

Director of Int'l Sales

View & edit data, roll up forecasts, & generate reports for all users directly below. Can't access data of users above or of other staff.

Western Sales Rep

QA Sales Rep

View & edit data, roll up forecasts, & generate reports only for own data. Can't access data of users above or of other staff.

Eastern Sales Rep

WA Sales Rep

View & edit data, roll up forecasts, & generate reports only for own data. Can't access data of users above or of other staff.

International Sales Rep

Asian Sales Rep

View & edit data, roll up forecasts, & generate reports only for own data. Can't access data of users above or of other staff.

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.

The screenshot shows the Salesforce Setup interface for Permission Sets. The left sidebar contains the navigation menu with 'Permission Sets' highlighted. The main content area displays a list of existing permission sets. A 'New' button is visible at the top left of the list.

Action	Permission Set Label	Description	License
<input type="checkbox"/>	Buylor	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"/>	CSM 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 (Partner Telephony)	Manage Service Cloud Voice contact centers that use Amazon Connect a...	Service Cloud Voice User
<input type="checkbox"/>	Contact Center Agent (Partner Telephony)	Access agent features in Service Cloud Voice contact centers that use A...	Service Cloud Voice User (Partner Telephony)
<input type="checkbox"/>	Contact Center Agent	Access agent features in Service Cloud Voice contact centers that use yo...	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"/>	Contact Center Supervisor	Access supervisor features in Service Cloud Voice contact centers that us...	Service Cloud Voice User
<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"/>	Delivery Estimation Service PermSet		Cloud Integration User
<input type="checkbox"/>	Experience Profile Manager		Salesforce

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

SETUP
Permission Sets

Permission Set
Create

Help for this Page

Save Cancel

Enter permission set information

Label Purchase Manager Create Access

API Name Purchase_Manager

Description

Session Activation Required ☐

= Required Information

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 Save Cancel

Tab Settings

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

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"/>

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 ▼

1 item selected

Search this list...

	Full Name ↑	Alias	Username	Role	Active	Profile
<input type="checkbox"/>	Annapurna Gurram	AGurram	medicalinventory@sb.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>	Chatter Expert	Chatter	chatty.00dd10000058bqluaa.yrgohck7wjvo@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/>	Integration User	integ	integration@00dd10000058bqluaa.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input checked="" type="checkbox"/>	John PurchaseM	jpurch	john@purchasem.com	Purchasing Manager	<input checked="" type="checkbox"/>	Purchase Manager
<input type="checkbox"/>	Security User	sec	insightssecurity@00dd10000058bqluaa.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User

Cancel

Next

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

Time Zone

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

Cancel

Back 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

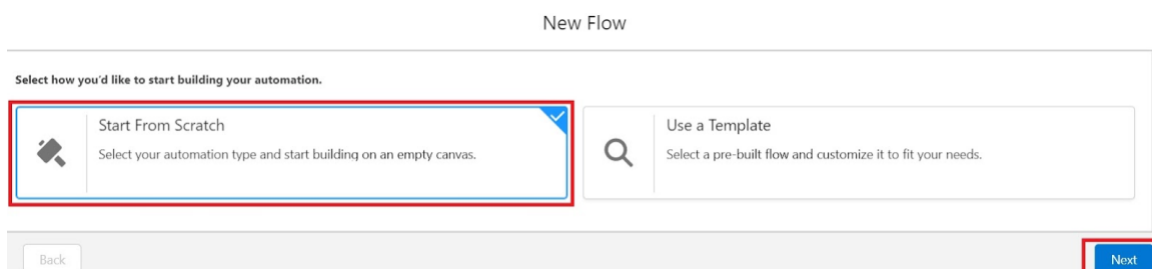
can be used to automate business processes, guide users through tasks, and integrate with external systems. They are highly versatile and can be configured to meet a wide range of business requirements without the need for custom code.

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

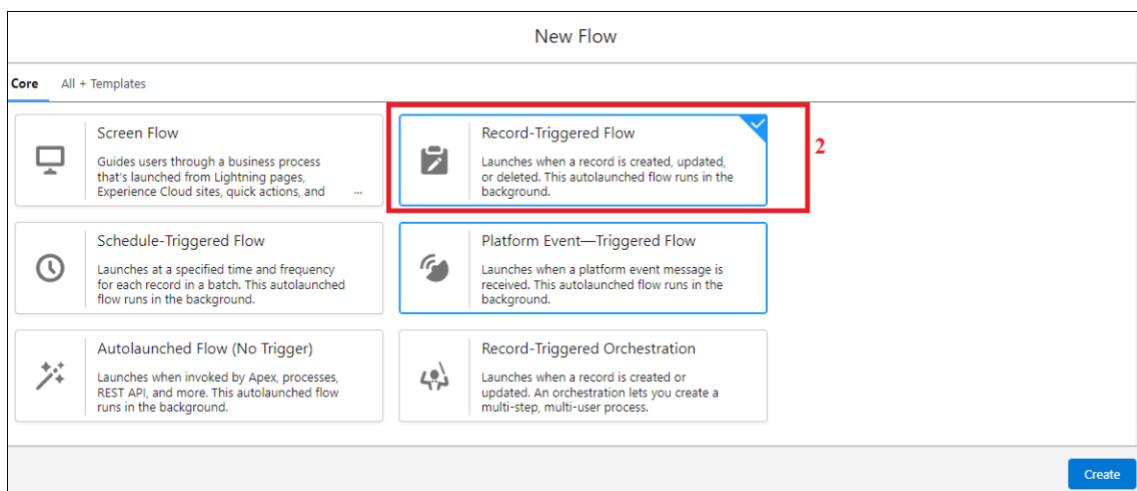
Duration: 0.2 Hrs

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**

Configure Start

Select Object

Select the object whose records trigger the flow when they're created, updated, or deleted.

* Object

Purchase Order **3**

Configure Trigger

* Trigger the Flow When:

☐ A record is created

☐ A record is updated

☒ A record is created or updated **4**

☐ A record is deleted

5. Set Entry Conditions : None

6. Select Fast Field Updates and click on Done

Set Entry Conditions

Specify entry conditions to reduce the number of records that trigger the flow and the number of times the flow is executed. Minimizing unnecessary flow executions helps to conserve your org's resources.

If you create a flow that's triggered when a record is updated, we recommend first defining entry conditions. Then select the **Only when a record is updated to meet the condition requirements** option for When to Run the Flow for Updated Records.

Condition Requirements

None **5**

* Optimize the Flow for:

Fast Field Updates **6**

Update fields on the record that triggers the flow to run. This high-performance flow runs *before* the record is saved to the database.

Actions and Related Records

Update any record and perform actions, like send an email. This more flexible flow runs *after* the record is saved to the database.

☐ Include a Run Asynchronously path to access an external system after the original transaction for the triggering record is successfully committed

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	Operator	Value
Id	Equals	{Record > Record ID}

+ 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

Assignment






* API Name ⓘ

Assignment_1

Description

Set Variable Values

Each variable is modified by the operator and value combination.

Variable	Operator	Value	
<div> ActualDeliveryDate ×</div>	<div>Equals</div>	<div><div> \$Record > Order Date ×</div></div>	
<div> ActualDeliveryDate ×</div>	<div>Add</div>	<div>3</div>	

+ 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}

 Update Records ×


*** How to Find Records to Update and Set Their Values**

☒ 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


 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.


Set Filter Conditions

Condition Requirements to Update Record

None—Always Update Record ▼

Set Field Values for the Purchase Order Record

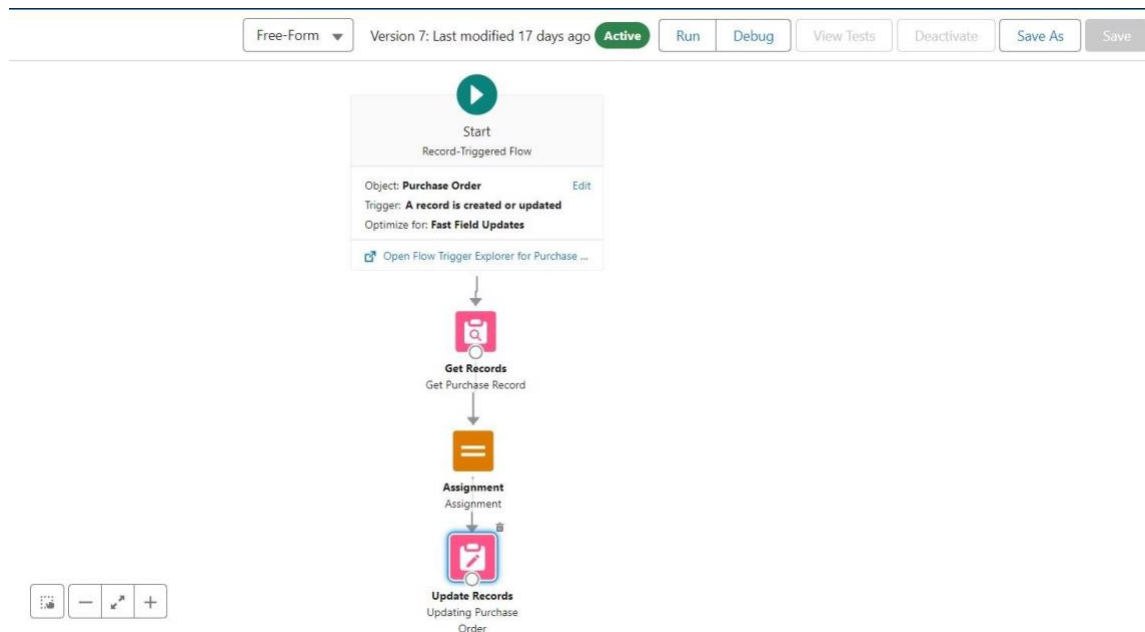
Field	Value
Actual_Delivery_Date__c	←  ActualDeliveryDate ×

 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.

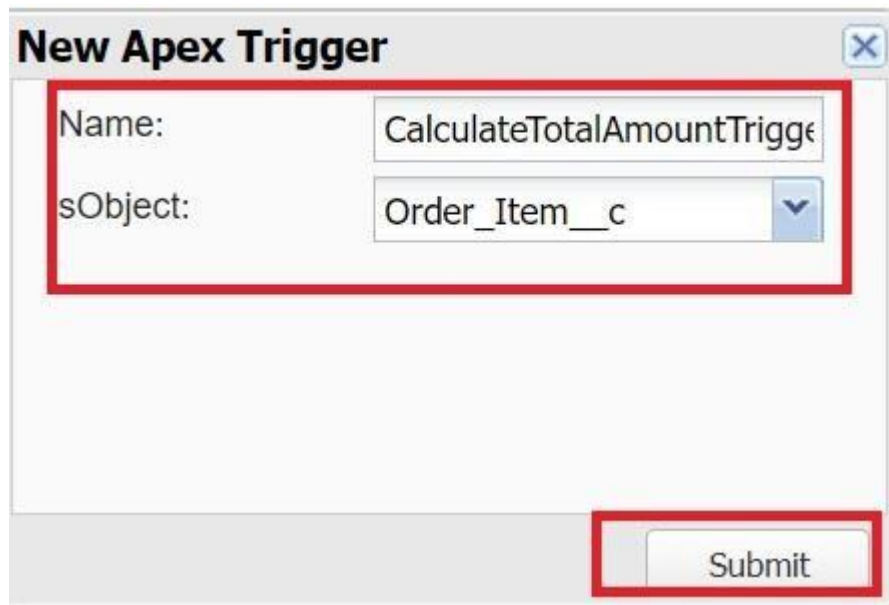
ii) Click on Developer Console: Click on the "Developer Console" option from the Setup menu. This will open the Developer Console in a new browser tab or window.

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.



New Apex Trigger

Name: CalculateTotalAmountTrigg

Object: Order_Item__c

Submit

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) {
```

```
        parentId.add(ordItem.Purchase_Order_Id__c);
```

```
    }
```

```
}
```

```
// Calculate the total amounts for affected Purchase Orders
```

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

```
if (!parentId.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

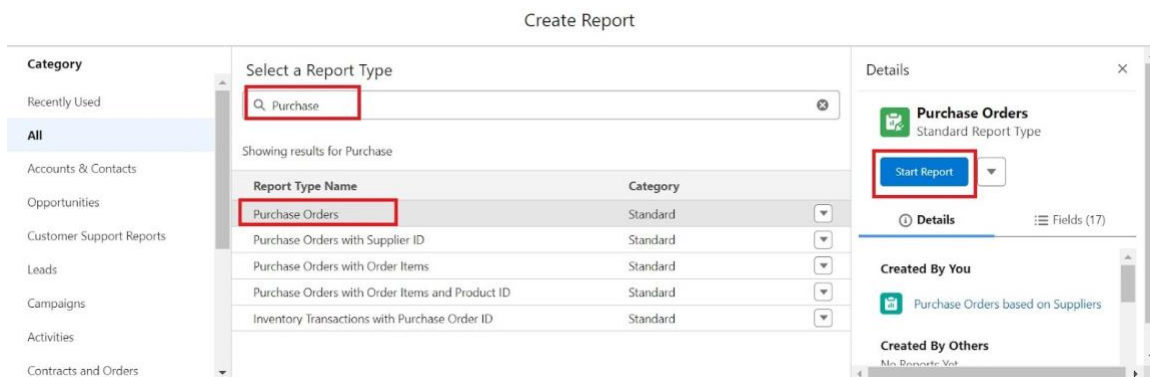
Skill Tags:

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

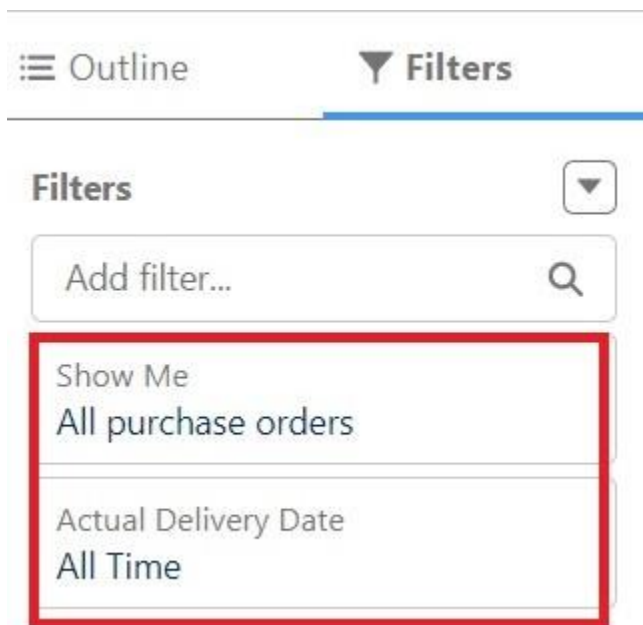
3. Click on Reports tab

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 \$)

The screenshot shows the 'Medical Inventory ...' app interface. The 'Reports' tab is selected, and the report 'Purchase Orders based on Suppliers' is displayed. The report preview shows a table with columns: Supplier ID, Purchase Order: Purchase Order ID, Order Count, and Total Order Cost. The table lists data for Supplier-001 (4), Supplier-002 (1), and a Total (5). The 'Save & Run' button is highlighted with a red box. The 'Update Preview Automatically' checkbox is also highlighted with a red box. The 'Columns' list in the left sidebar is highlighted with a red box, showing 'Add column...', '# Order Count', and '# Total Order Cost'.

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

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.

Medical Inventory ... Products Purchase Orders Order Items Inventory Transactions Suppliers **Reports** Dashboards

Search...

Report: Purchase Orders
Purchase Orders based on Suppliers

Enable Field Editing

Total Records: 5 Total Order Count: 14 Total Total Order Cost: ₹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

Row Counts: ☒ Detail Rows: ☒ Subtotals: ☐ Grand Total: ☒

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

☰ Outline

▼ Filters

Filters

▼

Add filter...

Q

Show Me

All purchase orders

Actual Delivery Date

All Time

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).

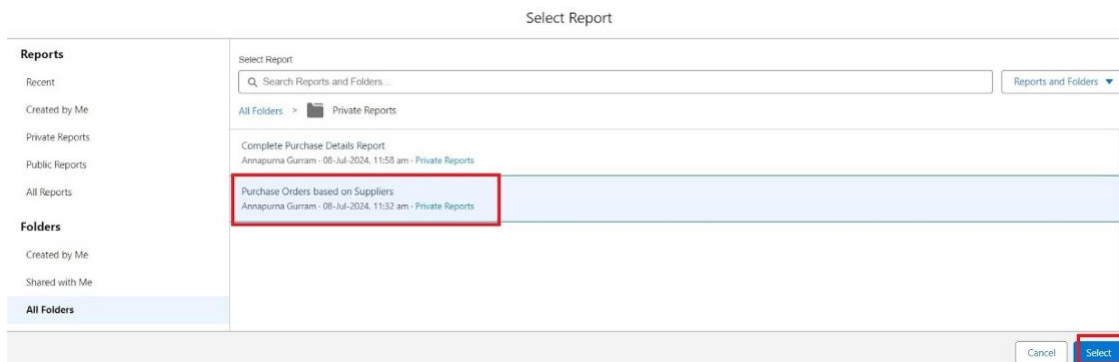
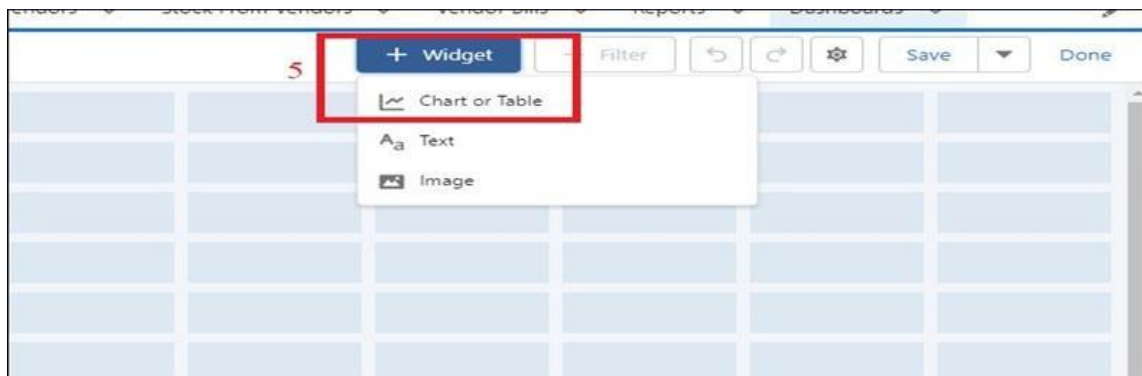
8. Click save and run

9. Give report name –Complete Purchase Details Report

10. Click Save

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



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 ●



[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

₹4.5k

₹22k

₹26k

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

