

MEDICAL INVENTORY MANAGEMENT

College Name: KPR COLLEGE OF ARTS SCIENCE AND RESEARCH

TEAM ID: NM2025TMID21492

TEAM MEMBERS: 4

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Email:23bai031@kprcas.ac.in

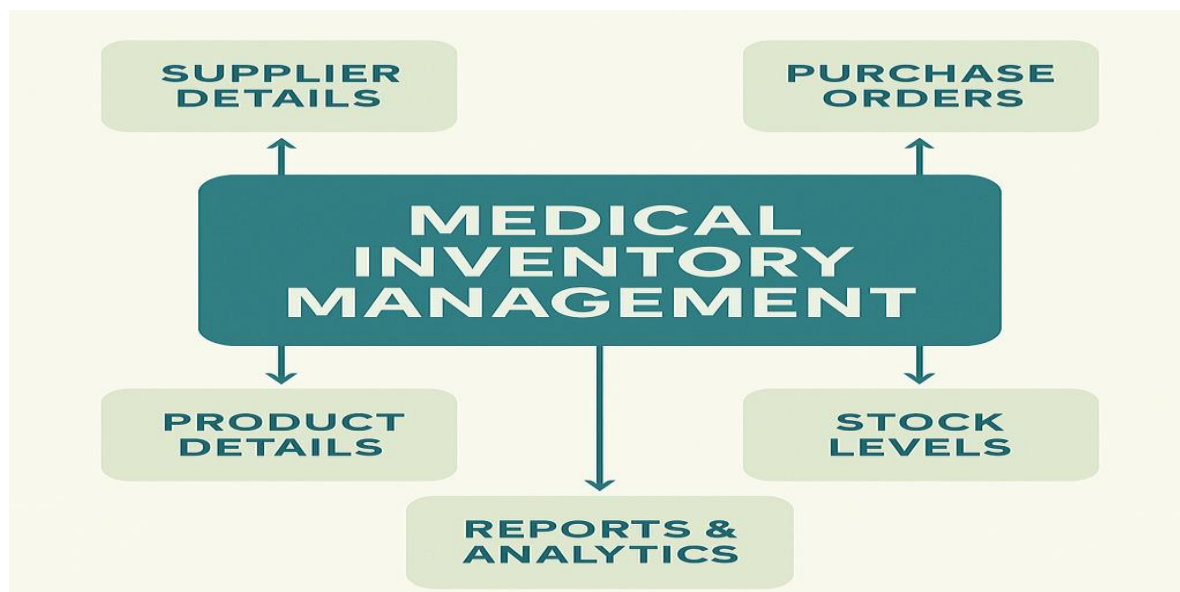
Team Member3: RAM KISHORE G

Email:23bai041@kprcas.ac.in

INTRODUCTION

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.



Purpose

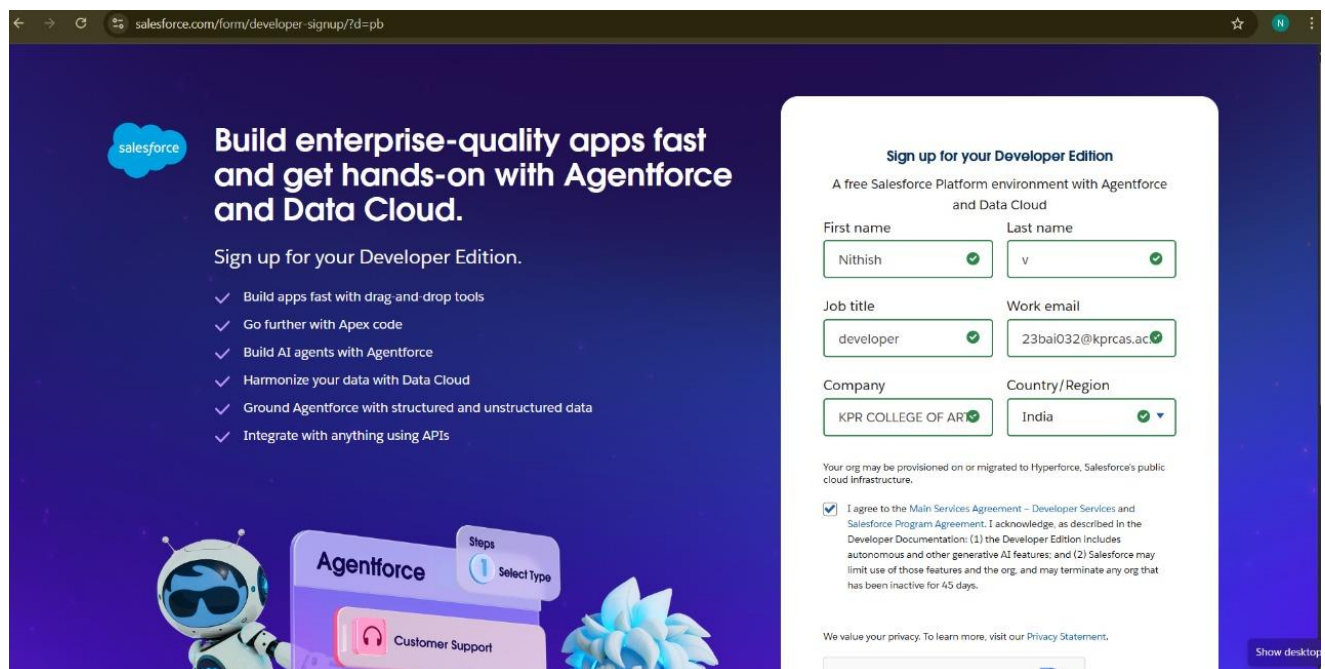
The purpose of this project is to develop a Salesforce-based medical inventory management system that ensures efficient tracking of suppliers, purchase orders, product details, and expiry dates. It aims to streamline operations, reduce errors,

prevent the usage of expired items, and provide comprehensive reports for better decision-making and supplier performance evaluation.

DEVELOPMENT PHASE

Creating Developer Account:

By using this URL - <https://developer.salesforce.com/signup>.



The screenshot shows the Salesforce Developer Edition signup page. On the left, there's a blue background with the Salesforce logo and text: "Build enterprise-quality apps fast and get hands-on with Agentforce and Data Cloud." Below this, it says "Sign up for your Developer Edition." and lists five benefits: "Build apps fast with drag-and-drop tools", "Go further with Apex code", "Build AI agents with Agentforce", "Harmonize your data with Data Cloud", and "Ground Agentforce with structured and unstructured data". At the bottom left, there's an illustration of a robot and a "Customer Support" button. On the right, there's a white form titled "Sign up for your Developer Edition" with the subtitle "A free Salesforce Platform environment with Agentforce and Data Cloud". The form has fields for "First name" (Nithish), "Last name" (v), "Job title" (developer), "Work email" (23bai032@kprcas.ac), "Company" (KPR COLLEGE OF ART), and "Country/Region" (India). Below the form, there's a checkbox for "I agree to the Main Services Agreement - Developer Services and Salesforce Program Agreement" and a link to the "Privacy Statement".

Build enterprise-quality apps fast and get hands-on with Agentforce and Data Cloud.

Sign up for your Developer Edition.

- ✓ Build apps fast with drag-and-drop tools
- ✓ Go further with Apex code
- ✓ Build AI agents with Agentforce
- ✓ Harmonize your data with Data Cloud
- ✓ Ground Agentforce with structured and unstructured data
- ✓ Integrate with anything using APIs

Agentforce

Customer Support

Sign up for your Developer Edition

A free Salesforce Platform environment with Agentforce and Data Cloud

First name: Nithish

Last name: v

Job title: developer

Work email: 23bai032@kprcas.ac

Company: KPR COLLEGE OF ART

Country/Region: India

I agree to the Main Services Agreement - Developer Services and Salesforce Program Agreement. I acknowledge, as described in the Developer Documentation: (1) the Developer Edition includes autonomous and other generative AI features; and (2) Salesforce may limit use of those features and the org, and may terminate any org that has been inactive for 45 days.

We value your privacy. To learn more, visit our Privacy Statement.

Show desktop

- After creating developer account, Go to setup page and create the object.

← → ↻

orgfarm-c0abec7f93-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgK0000023tej/Details/view

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👤

Setup

Home

Object Manager

SETUP > OBJECT MANAGER

Product

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

Details

Description

API Name

Product_c

Custom

✓

Singular Label

Product

Plural Label

Products

Enable Reports

✓

Track Activities

Track Field History

Deployment Status

Deployed

Help Settings

Standard salesforce.com Help Window

Edit

Delete

← → ↻

Search Setup

☆

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🔍

⚙️

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👤

Setup

Home

Object Manager

SETUP > OBJECT MANAGER

Purchase Order

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

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Search Layouts

List View Button Layout

Restriction Rules

Details

Description

API Name

Purchase_Order_c

Custom

✓

Singular Label

Purchase Order

Plural Label

Purchase Orders

Enable Reports

✓

Track Activities

Track Field History

Deployment Status

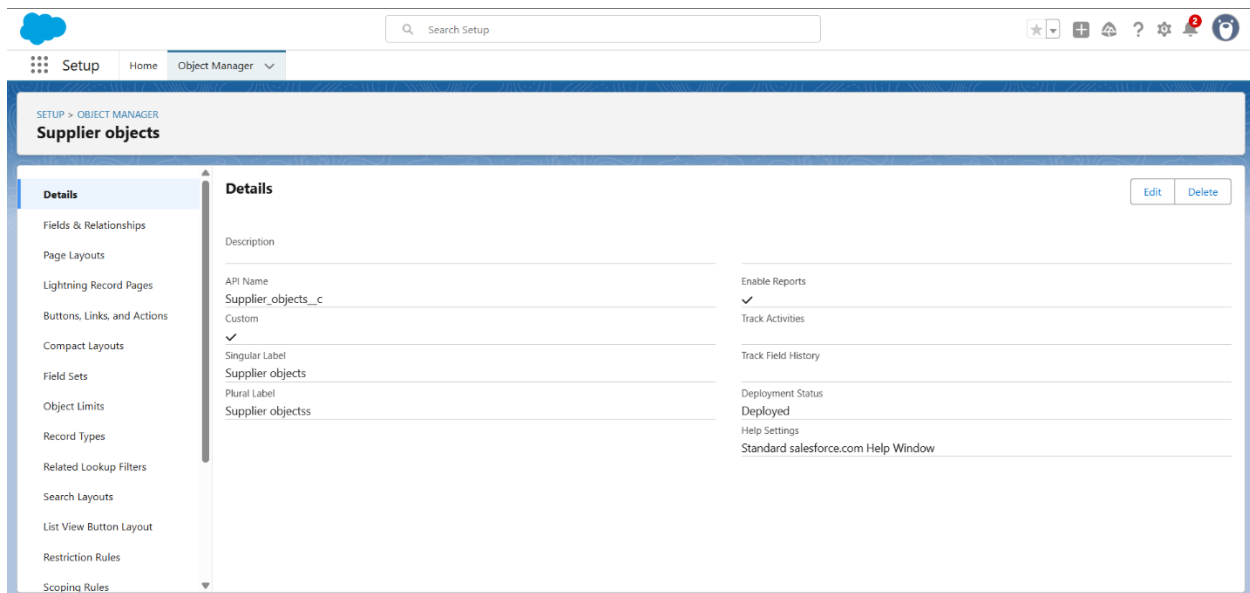
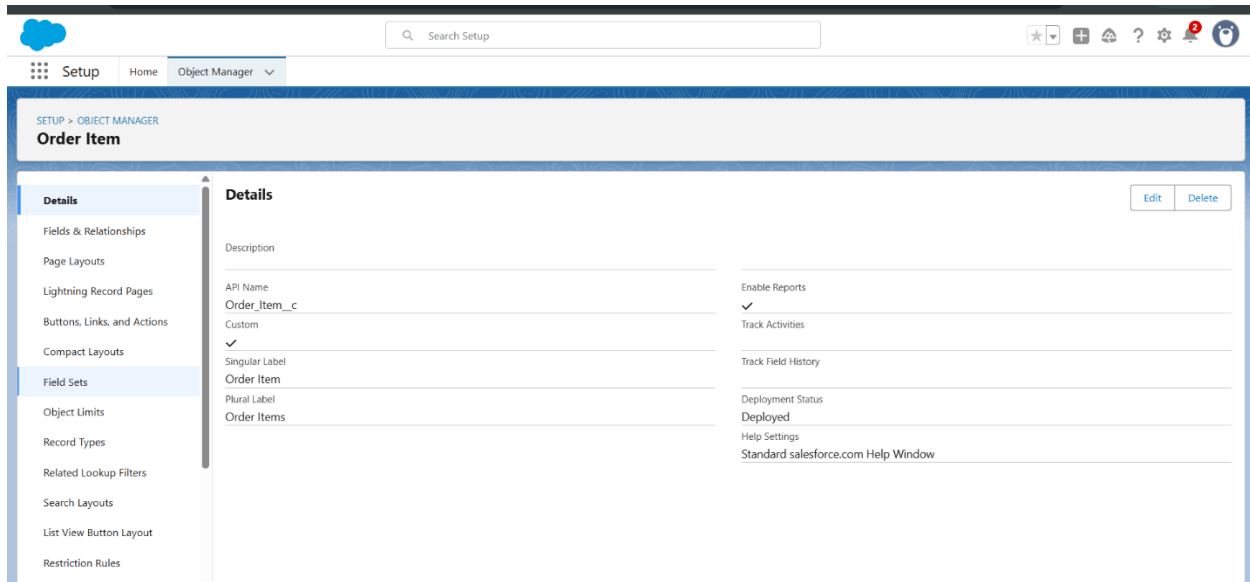
Deployed

Help Settings

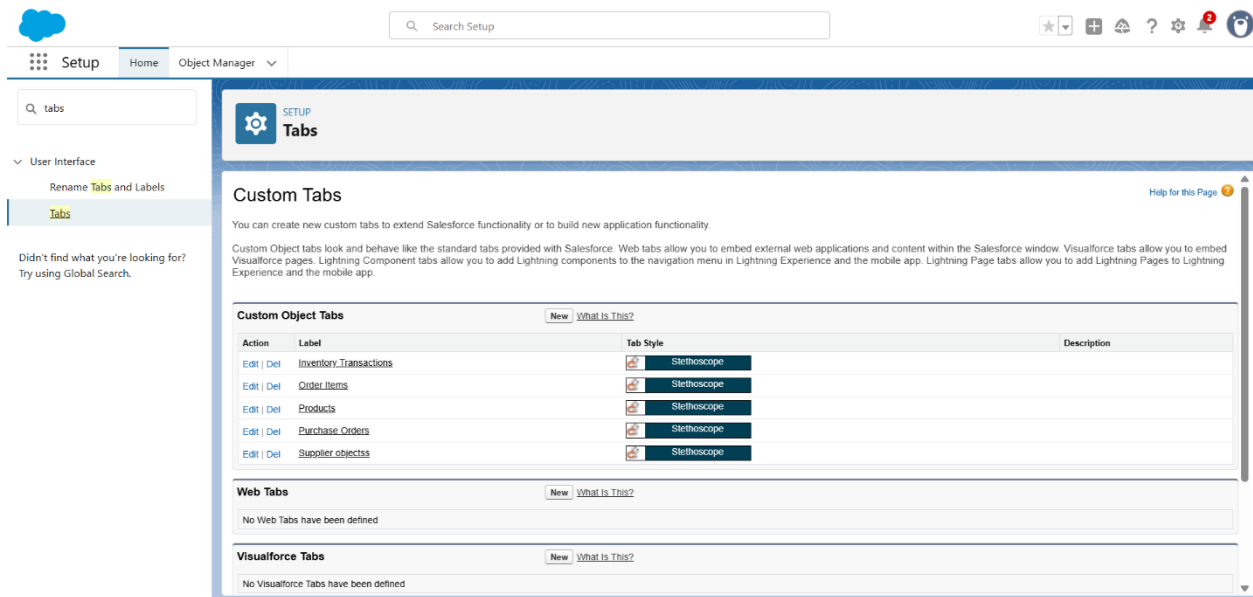
Standard salesforce.com Help Window

Edit

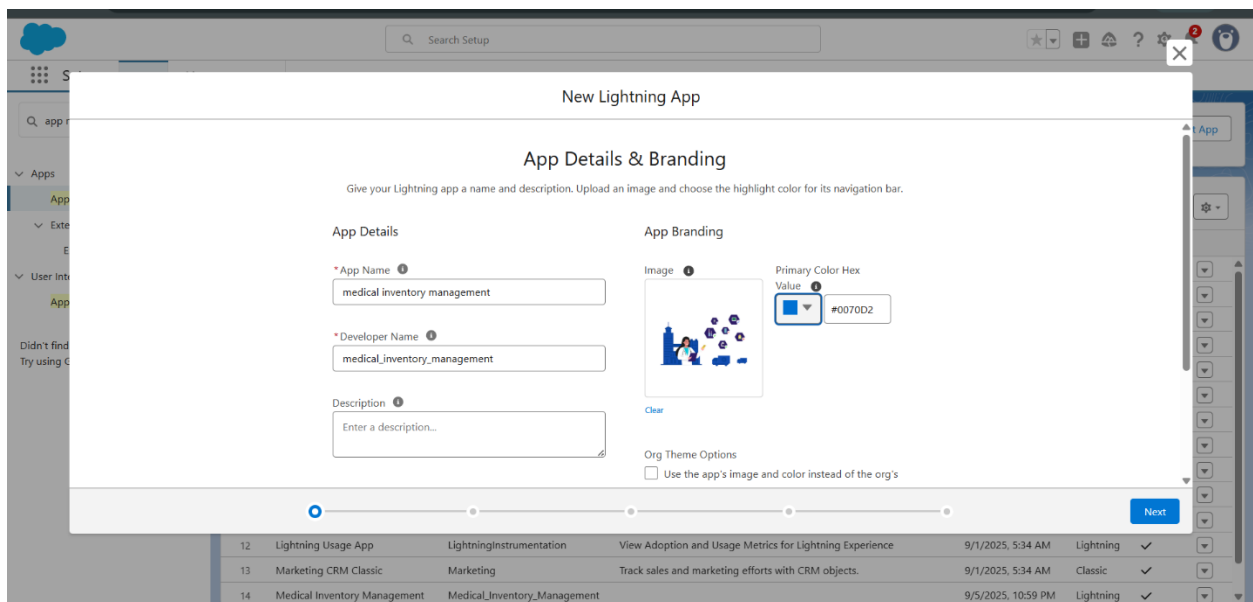
Delete



- All the given objects has been created.
- Created the five tabs inventory transaction,order item,product,purchase order,supplier objects.



- Created a lightning app for Medical Inventory Management.



- Created a text field in product object.

Setup > OBJECT MANAGER

Product

Details

Fields & Relationships
8 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)		
Current Stock Level	Current_Stock_Level__c	Number(18, 0)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Product Description	Product_Description__c	Text Area(255)		
Product ID	Name	Text(80)		✓
Product Name	Product_Name__c	Text(255)		
Unit Price	Unit_Price__c	Currency(16, 2)		

Setup > OBJECT MANAGER

Product

Details

Fields & Relationships

Product Field
Product ID
[Back to Product](#)

[Set Field-Level Security](#) [View Field Accessibility](#)

Field Information

Field Label	Product ID	Field Name	Name
Data Type	Text(80)		
Description			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			

Validation Rules [New](#) [Validation Rules Help](#)

No validation rules defined.

- Created a lookup relationship , date field , roll up summary in purchase order.

Setup > OBJECT MANAGER

Purchase Order

Details

Fields & Relationships
6 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)		
Order Date	Order_Date__c	Date		
Owner	OwnerId	Lookup(User.Group)		✓
Purchase Order ID	Name	Text(80)		✓
Supplier objects ID	Supplier_objects_ID__c	Lookup(Supplier objects)		✓

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

Scoping Rules

- Created a unit price formula, amount formula field in order item.

Setup > OBJECT MANAGER

Order Item

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)		
Order Item ID	Name	Text(80)		✓
Owner	OwnerId	Lookup(User.Group)		✓

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

Scoping Rules

- Created a picklist, total order cost field in inventory transaction .

Setup Home Object Manager

Search Setup

Setup > OBJECT MANAGER

Inventory Transaction

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)		
Inventory Transaction ID	Name	Text(80)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓

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

- Created a phone,email field in supplier object .

Setup Home Object Manager

Search Setup

Setup > OBJECT MANAGER

Supplier objects

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)		✓
Supplier objects 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
List View Button Layout
Restriction Rules
Scoping Rules

- Edit page layouts in product, purchase order, order item, supplier object, inventory transaction.

The screenshot shows the Salesforce Setup interface for editing the Product Page Layout. The left sidebar contains a navigation menu with options like Details, Fields & Relationships, Page Layouts (selected), Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Restriction Rules, and Scoping Rules.

The main content area is titled "Product" and includes a "Quick Find" search bar. Below the search bar, there are sections for "Quick Actions in the Salesforce Classic Publisher" and "Salesforce Mobile and Lightning Experience Actions".

The "Product Detail" section shows a table of fields and their values:


Field Name	Value
Product ID	Sample Text
Product Name	Sample Text
Product Description	Sample Text
Unit Price	\$123.45
Current Stock Level	81.682
Owner	Sample Text

The screenshot shows the Salesforce Setup interface for editing the Purchase Order Page Layout. The left sidebar contains a navigation menu with options like Details, Fields & Relationships, Page Layouts (selected), Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Restriction Rules, and Scoping Rules.


The main content area is titled "Purchase Order" and includes a "Quick Find" search bar. Below the search bar, there are sections for "Quick Actions in the Salesforce Classic Publisher" and "Salesforce Mobile and Lightning Experience Actions".

The "Purchase Order Detail" section shows a table of fields and their values:

Field Name	Value
Purchase Order ID	Sample Text
Supplier objects ID	Sample Text
Order Date	9/6/2025
Owner	Sample Text



Search Setup



SetupHomeObject Manager

SETUP > OBJECT MANAGER

Order Item

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

Scoping Rules

SaveQuick SavePreview As...CancelUndoRedoLayout Properties

Fields

Buttons

Quick Actions

Mobile & Lightning Actions

Expanded Lookups

Related Lists

Report Charts

Quick Find

Field Name

SectionOrder Item ID

Blank SpaceOwner

Created By

Last Modified By

Actions in this section are currently inherited from the global publisher layout. You can [override the global publisher layout](#) to set a customized list of actions for the publisher on pages that use this layout.

Salesforce Mobile and Lightning Experience Actions

Actions in this section are predefined by Salesforce. You can [override the predefined actions](#) to set a customized list of actions on Lightning Experience and mobile app pages that use this layout. If you customize the actions in the Quick Actions in the Salesforce Classic Publisher section, and have saved the layout, then this section inherits that set of actions by default when you click to override.

Order Item Detail

Standard Buttons

EditDeleteCloneChange OwnerChange Record TypePrintable ViewSharingSharing HierarchyEdit Labels

Custom Buttons

Information (Header visible on edit only)


Order Item IDSample Text

OwnerSample Text


System Information (Header visible on edit only)

Created BySample Text

Last Modified BySample Text



Search Setup



SetupHomeObject Manager

SETUP > OBJECT MANAGER

Inventory Transaction

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

Scoping Rules

SaveQuick SavePreview As...CancelUndoRedoLayout Properties

Fields

Buttons

Quick Actions

Mobile & Lightning Actions

Expanded Lookups

Related Lists

Report Charts

Quick Find

Field Name

SectionLast Modified By

Blank SpaceOwner

Created By

Inventory Transac...

Actions in this section are predefined by Salesforce. You can [override the predefined actions](#) to set a customized list of actions on Lightning Experience and mobile app pages that use this layout. If you customize the actions in the Quick Actions in the Salesforce Classic Publisher section, and have saved the layout, then this section inherits that set of actions by default when you click to override.

Inventory Transaction Detail

Standard Buttons

EditDeleteCloneChange OwnerChange Record TypePrintable ViewSharingSharing HierarchyEdit Labels

Custom Buttons

Information (Header visible on edit only)

Inventory Transaction IDSample Text

OwnerSample Text

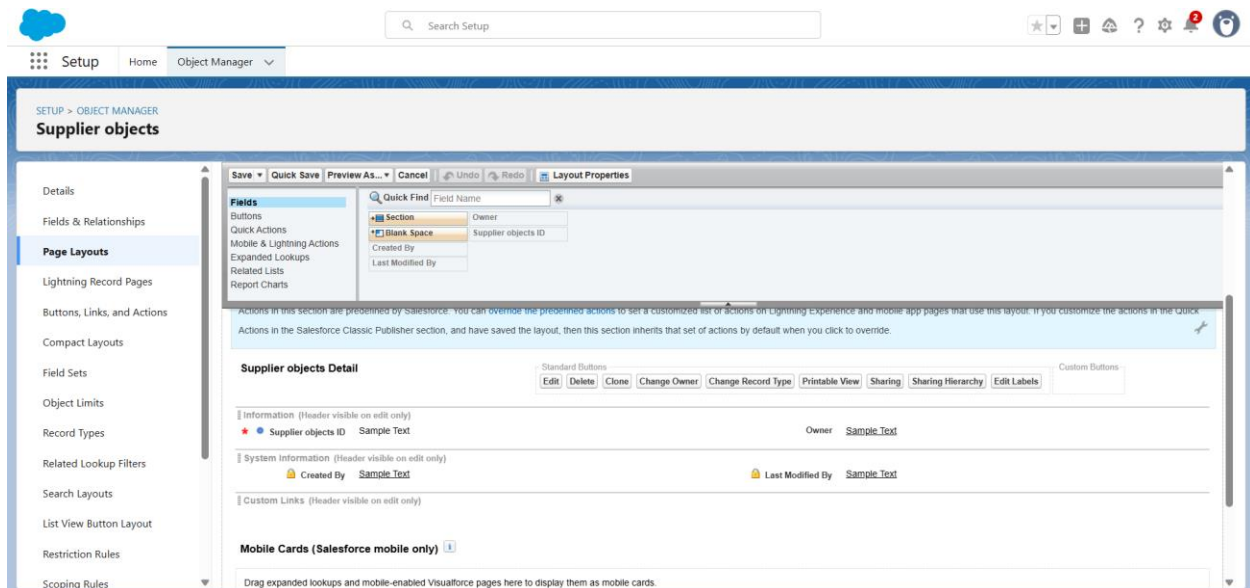
System Information (Header visible on edit only)

Created BySample Text

Last Modified BySample Text

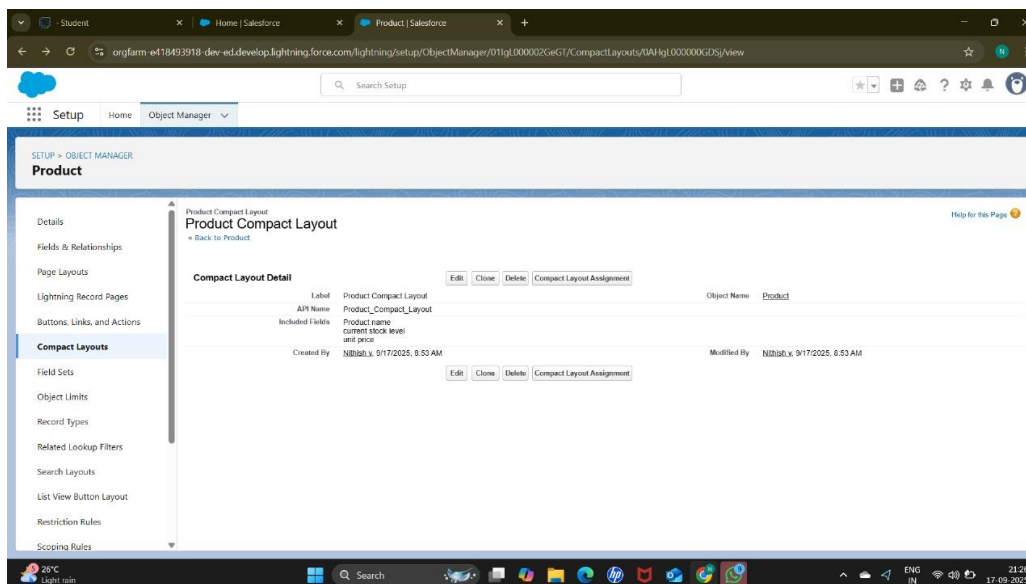
Custom Links (Header visible on edit only)

Mobile Cards (Salesforce mobile only)

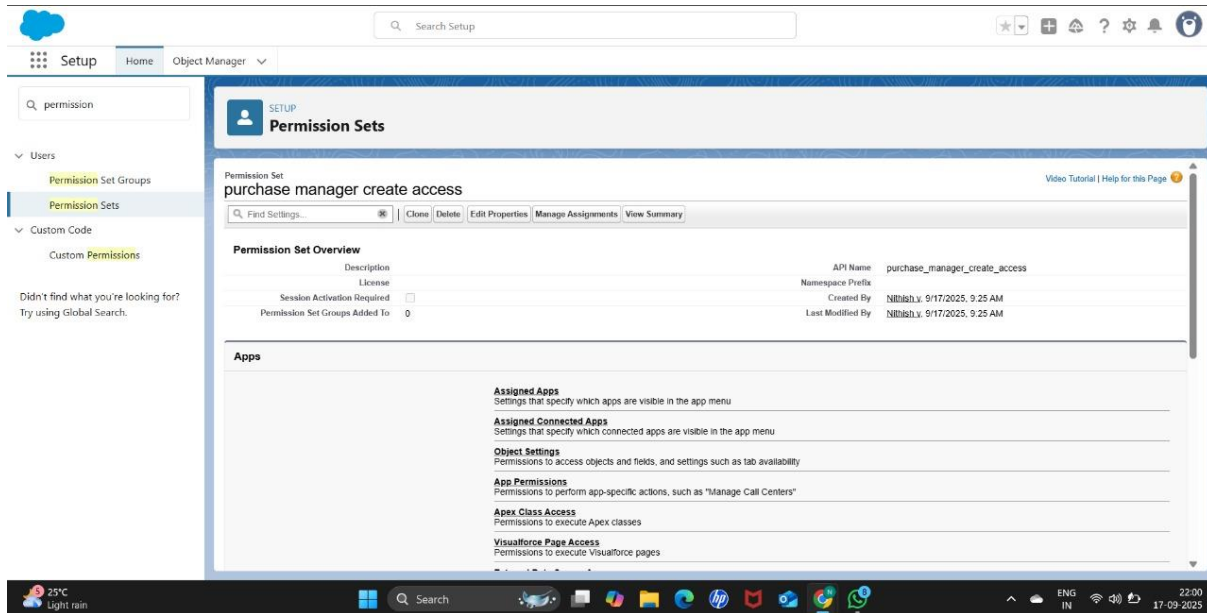


Compact layout

- Created compact layout for product.

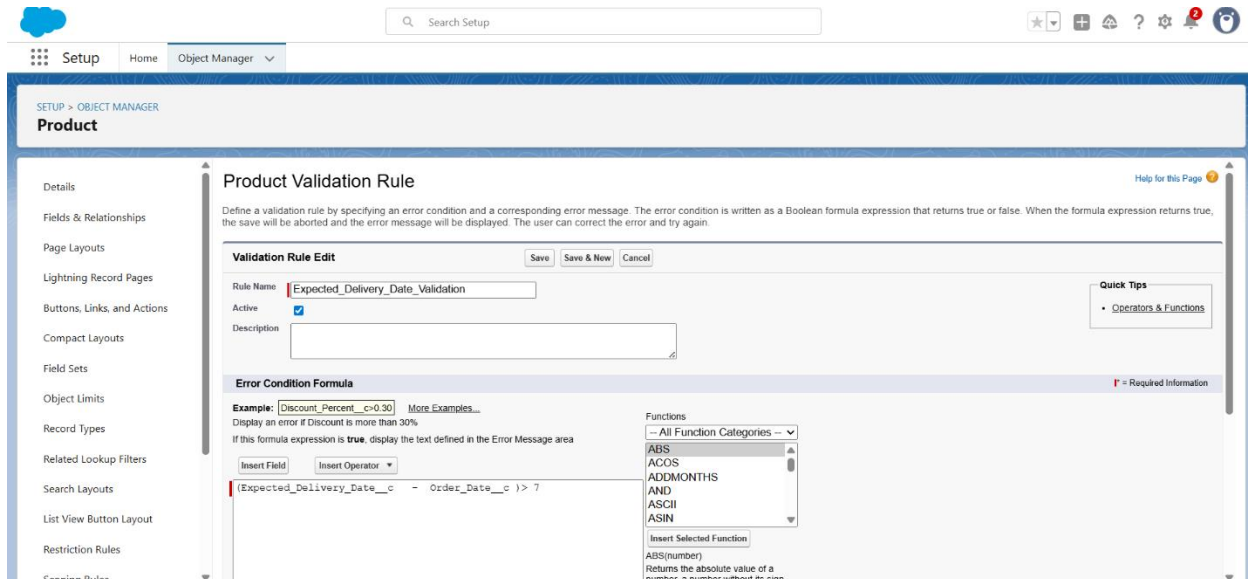


- Created compact layout for purchase object.



Validation rules

- create an Expected Delivery Date Validation rule to a Employee Object.



Profile

- created an inventory and purchase manager profile.

Setup

Home

Object Manager

Search Setup

Star

Plus

Home

Help

Settings

2

Profile

profile

Users

Profiles

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

SETUP

Profiles

Clone Profile

Help for this Page

Enter the name of the new profile.

You must select an existing profile to clone from.

Required Information

Existing Profile

Standard User

User License

Salesforce

Profile Name

Inventory Manager

Save

Cancel

Setup

Home

Object Manager

Search Setup

Star

Plus

Home

Help

Settings

2

Profile

profile

Users

Profiles

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

SETUP

Profiles

Clone Profile

Help for this Page

Enter the name of the new profile.

You must select an existing profile to clone from.

Required Information

Existing Profile

Standard User

User License

Salesforce

Profile Name

Purchase Manager

Save

Cancel

Role

- To create a purchasing manager role.

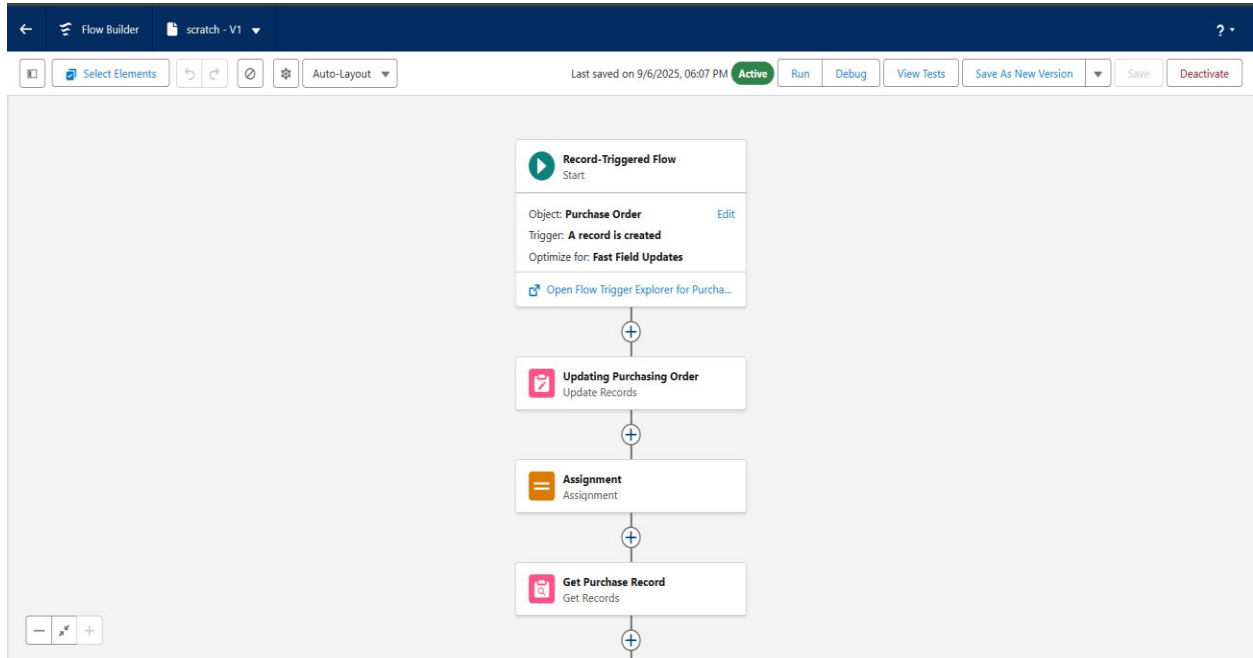
The screenshot shows the Salesforce Setup interface with the 'Roles' page selected. The left sidebar contains a search bar with 'roles' and a navigation menu with 'Users', 'Roles', 'Feature Settings', 'Sales', 'Service', and 'Case Teams'. The main content area is titled 'Creating the Role Hierarchy' and displays a tree view of the organization's role hierarchy for 'KPR COLLEGE OF ARTS SCIENCE AND RESEARCH'. The hierarchy starts with 'CEO' at the top, followed by 'CFO', 'COO', and then various support and service roles like 'SVP, Customer Service & Support', 'Customer Support, International', 'Customer Support, North America', 'Installation & Repair Services', 'SVP, Human Resources', and 'SVP, Sales & Marketing'. Each role has an 'Add Role' link next to it.

- Created a permission set.

The screenshot shows the Salesforce Setup interface with the 'Permission Sets' page selected. The left sidebar contains a search bar with 'permis' and a navigation menu with 'Users', 'Permission Set Groups', 'Permission Sets', 'Custom Code', and 'Custom Permissions'. The main content area is titled 'Permission Sets' and displays a table of all permission sets. The table has columns for 'Action', 'Permission Set Name', 'Description', and 'License'. The list includes various legacy and current permission sets, such as 'Legacy Data Cloud Data Aware Specialist', 'Legacy Data Cloud Marketing Admin', 'Legacy Data Cloud Marketing Manager', 'Legacy Data Cloud Marketing Specialist', 'Legacy Data Cloud for Marketing Data Aware Specialist', 'Legacy Data Cloud for Marketing Manager', 'Legacy Data Cloud for Marketing Specialist', 'Access Agentforce Default Agent', 'Agent Platform Builder', 'Agentforce Default Admin', 'Agentforce Service Agent Configuration', 'Agentforce Service Agent Object Access', 'Agentforce Service Agent Secure Base', and 'Agentforce Service Agent User'.

Flows

- Created Flow to update the Actual Delivery Date.



Apex Triggers

- Created a Trigger to Calculate total amount on Order Item.

```
File Edit Debug Test Workspace Help < >
CalculateTotalAmountHandl.apxt
Code Coverage: None API Version: 64 Go To

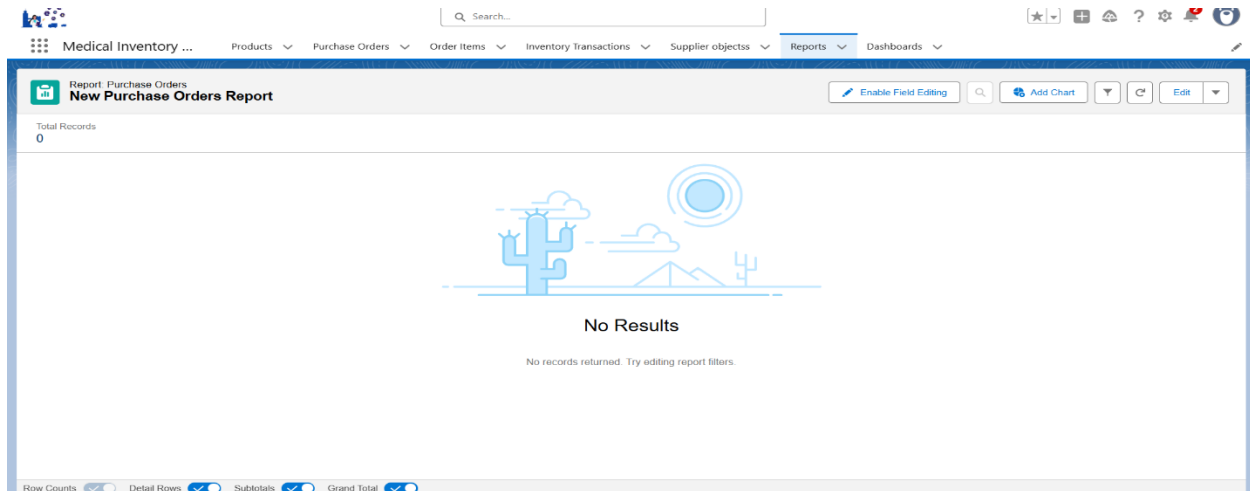
1 trigger CalculateTotalAmountHandl on Order_Item__c (before insert) {
2 public class CalculateTotalAmountHandler {
3
4
5
6 // Method to calculate the total amount for Purchase Orders based on related Order Items
7
8 public static void calculateTotal(List<Order_Item__c> newItems, List<Order_Item__c> oldItems, Boolean isInsert, Boolean isUpdate, Boolean isDelete) {
9
10
11
12 // Collect Purchase Order IDs affected by changes in Order_Item__c records
13
14 Set<Id> parentIds = new Set<Id>();
15
16
17
18 // For insert, update, and undelete scenarios
19
20 }
```

Logs Tests Checkpoints Query Editor View State Progress Problems

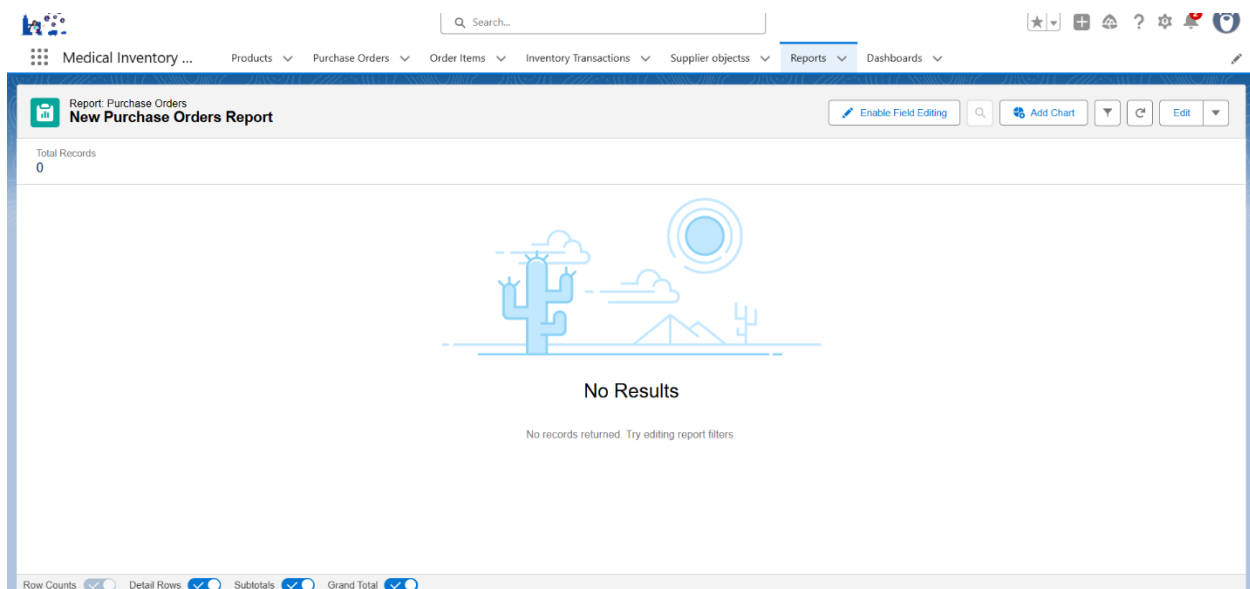
User	Application	Operation	Time	Status	Read	Size
------	-------------	-----------	------	--------	------	------

Report

- Create a Purchase Orders based on Suppliers(Summary) Report

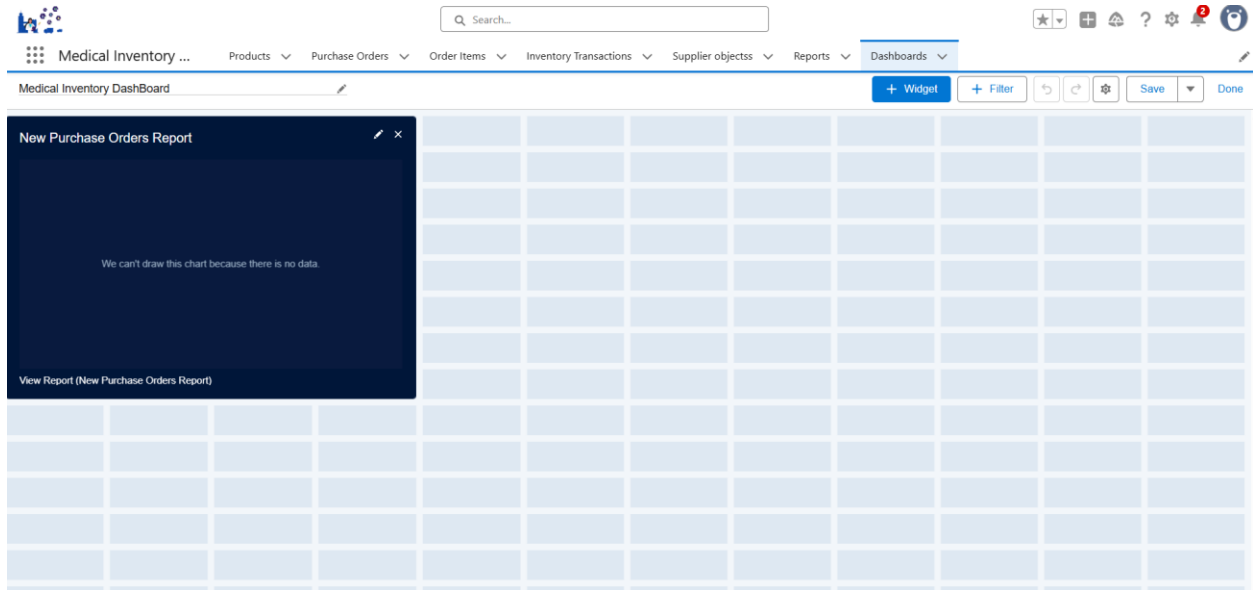


- Create a Complete Purchase Details Report



Dashboard

- Created Dashboard



- To view the dashboard

