# MEDICAL INVENTORY MANAGEMENT

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# 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.
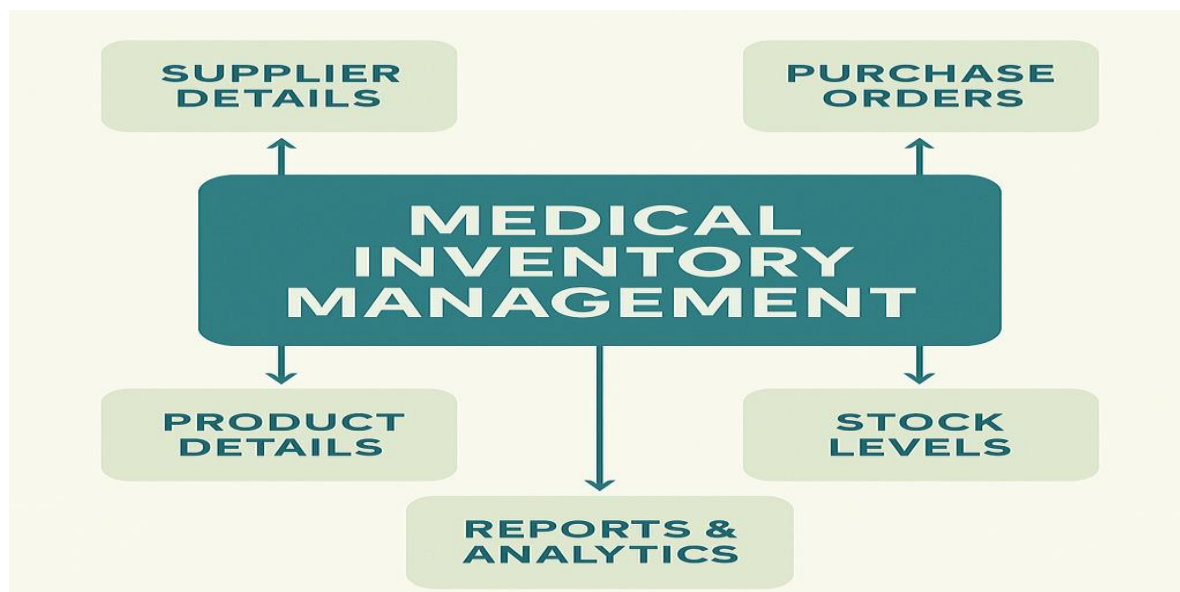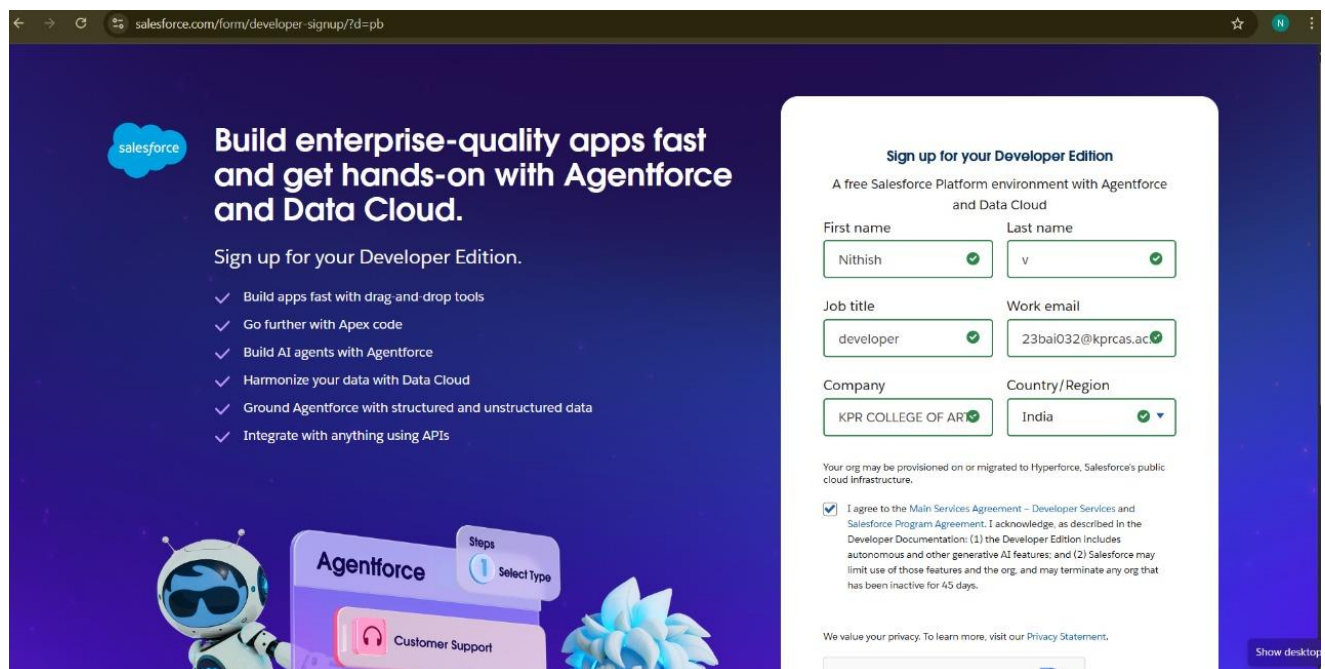


## Purpose

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.



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

Search Setup

Setup    Home    Object Manager

SETUP > OBJECT MANAGER
**Product**

**Details**

Details                                    Edit    Delete

- 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

Description

API Name                                   Enable Reports
Product__c                                 ✓
Custom                                     Track Activities
✓
Singular Label                             Track Field History
Product
Plural Label                               Deployment Status
Products                                   Deployed
                                           Help Settings
                                           Standard salesforce.com Help Window

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Search Setup

Setup    Home    Object Manager

SETUP > OBJECT MANAGER
**Purchase Order**

**Details**

Details                                    Edit    Delete

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Description

API Name                                   Enable Reports
Purchase_Order__c                          ✓
Custom                                     Track Activities
✓
Singular Label                             Track Field History
Purchase Order
Plural Label                               Deployment Status
Purchase Orders                            Deployed
                                           Help Settings
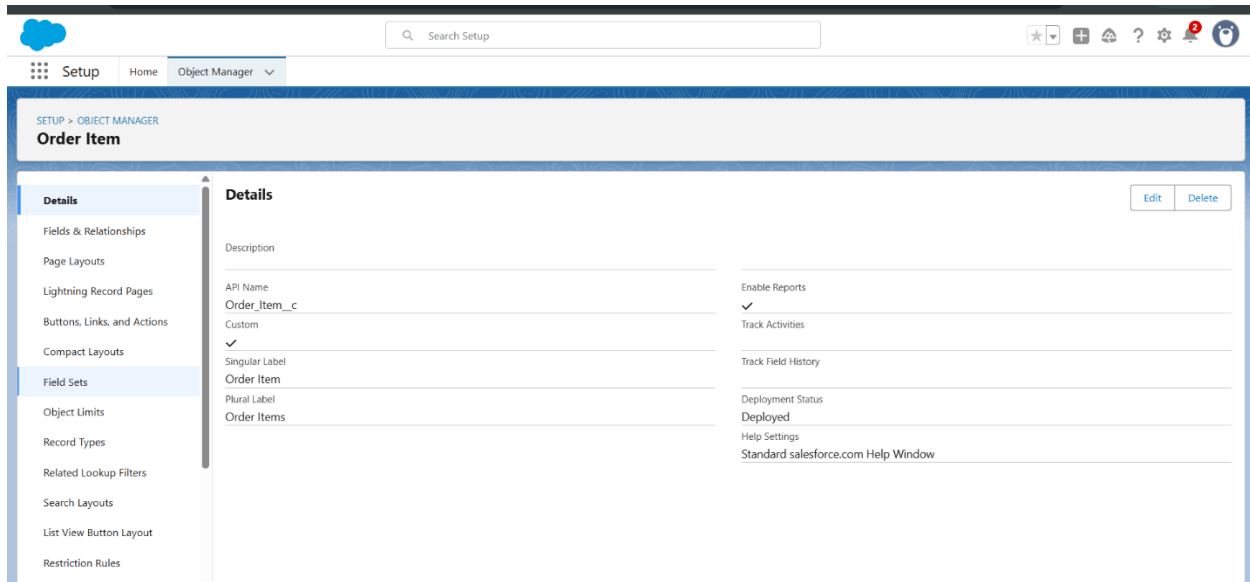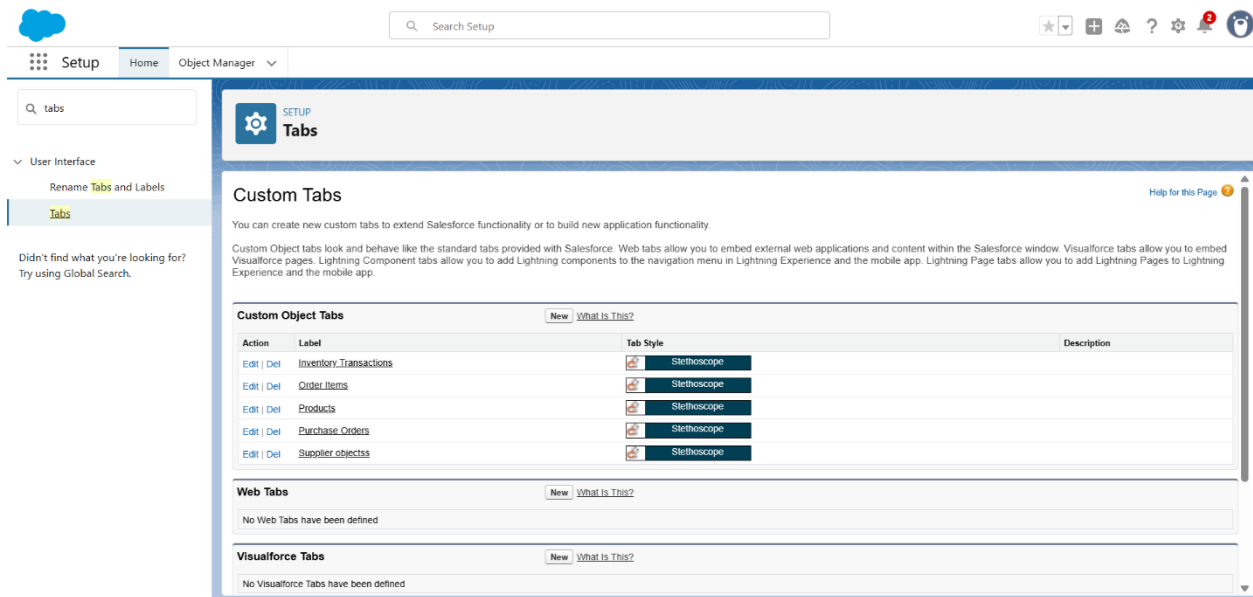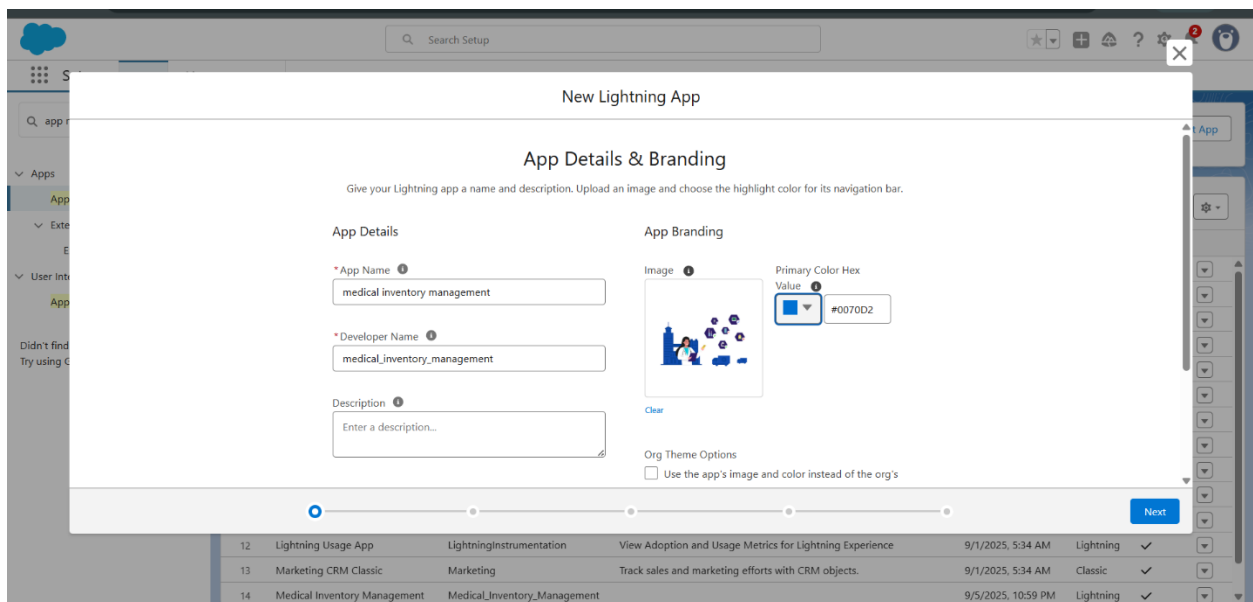                                           Standard salesforce.com Help Window
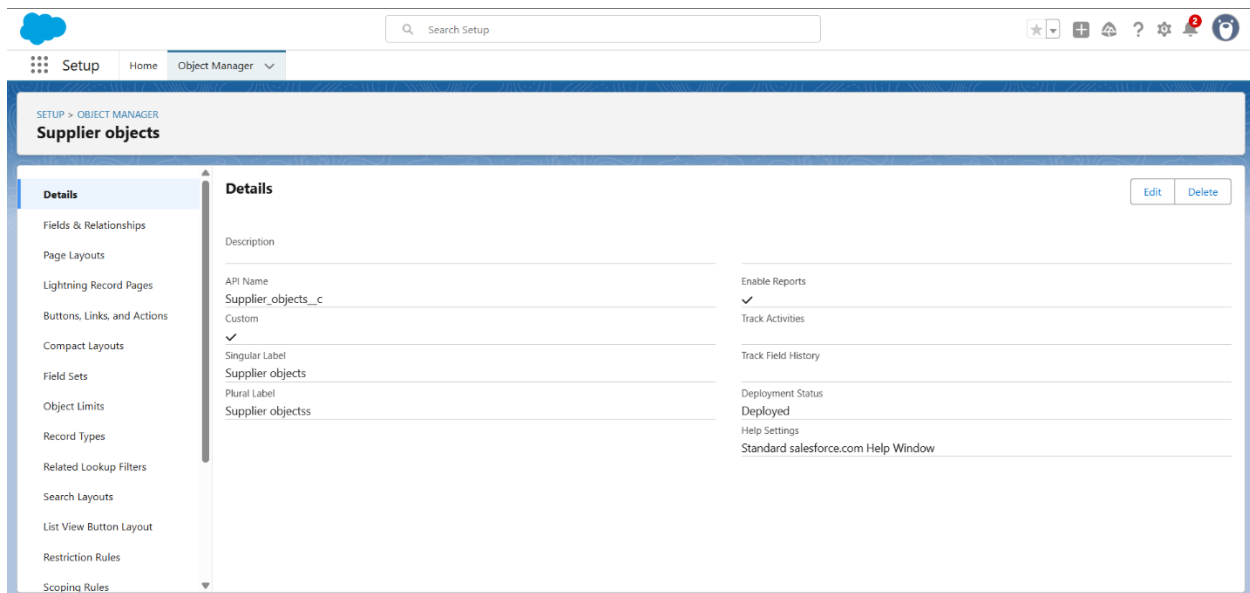
- All the given objects has been created.
- Created the five tabs inventory transaction,order item,product,purchase order,supplier objects.

- 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) | | | ▼ |

Left navigation panel:
- 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

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SETUP > OBJECT MANAGER
**Product**

Left navigation panel:
- Details
- **Fields & Relationships**
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Product Field
**Product ID**
Back to Product

Help for this Page

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.

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



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

- Created a phone,email field in  supplier object .

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

## Order Item

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

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

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

Quick Find | Field Name
Section — Order Item ID
Blank Space — Owner
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
Edit | Delete | Clone | Change Owner | Change Record Type | Printable View | Sharing | Sharing Hierarchy | Edit Labels

Custom Buttons

**Information** (Header visible on edit only)
★ ● Order Item ID — Sample Text          Owner — Sample Text

**System Information** (Header visible on edit only)
🔒 Created By — Sample Text          🔒 Last Modified By — Sample Text

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## Inventory Transaction

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

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

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

Quick Find | Field Name
Section — Last Modified By
Blank Space — Owner
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
Edit | Delete | Clone | Change Owner | Change Record Type | Printable View | Sharing | Sharing Hierarchy | Edit Labels

Custom Buttons

**Information** (Header visible on edit only)
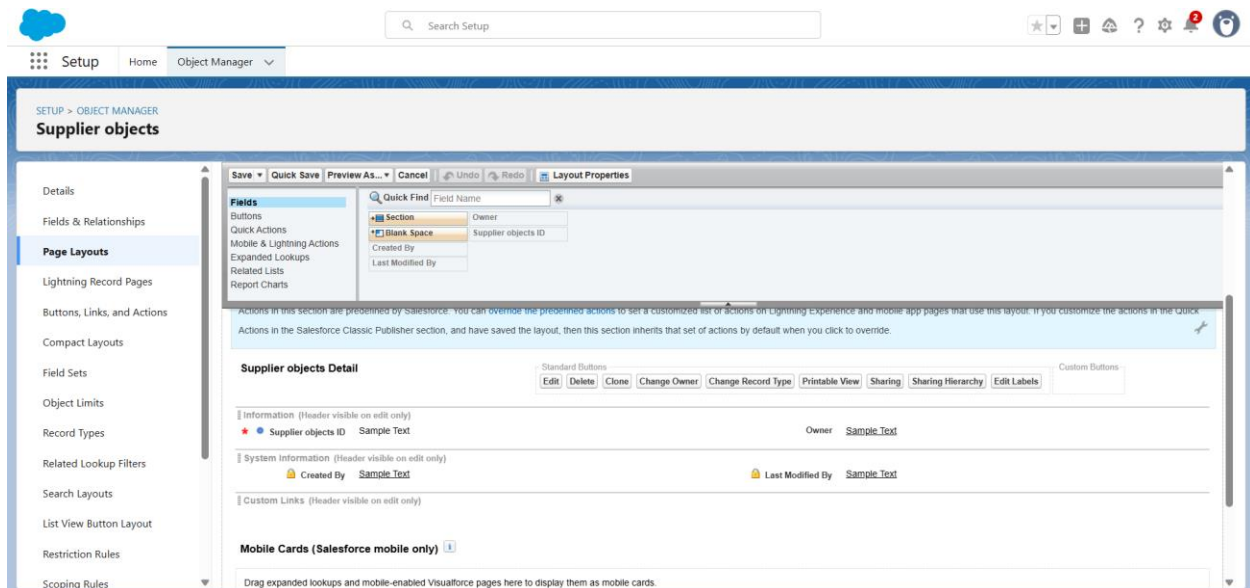★ ● Inventory Transaction ID — Sample Text          Owner — Sample Text

**System Information** (Header visible on edit only)
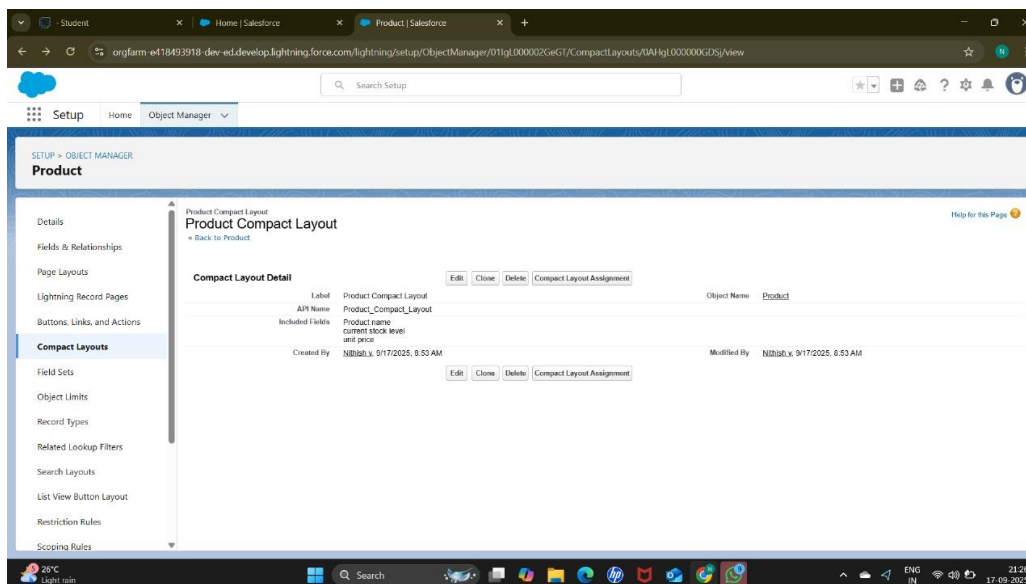🔒 Created By — Sample Text          🔒 Last Modified By — Sample Text

**Custom Links** (Header visible on edit only)
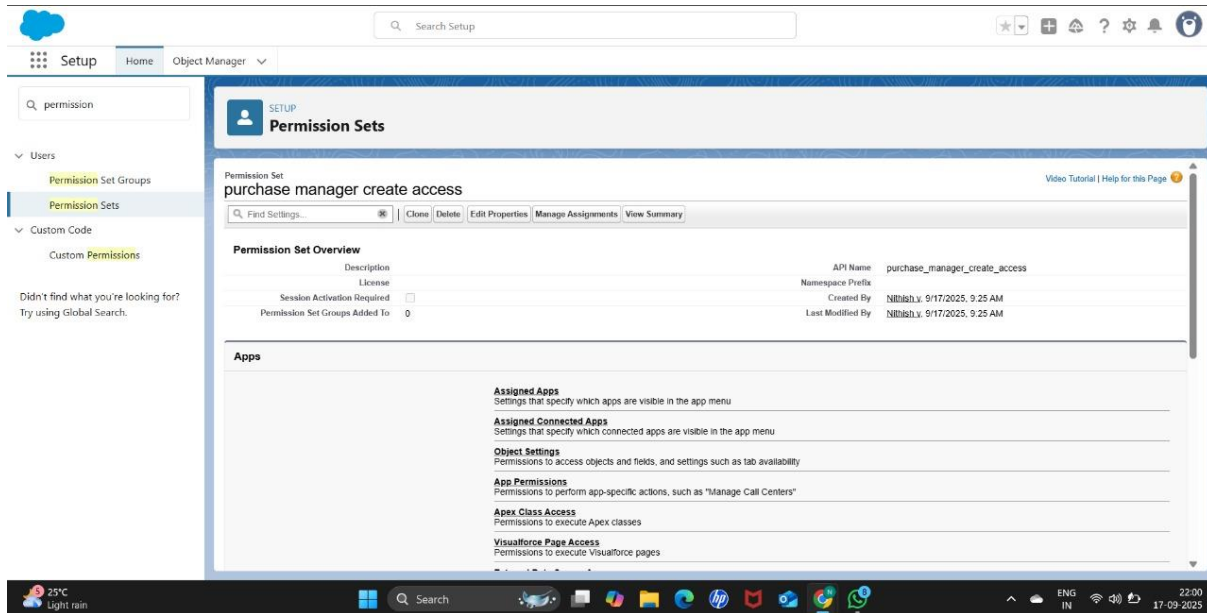
**Mobile Cards (Salesforce mobile only)** ⓘ

# Compact layout
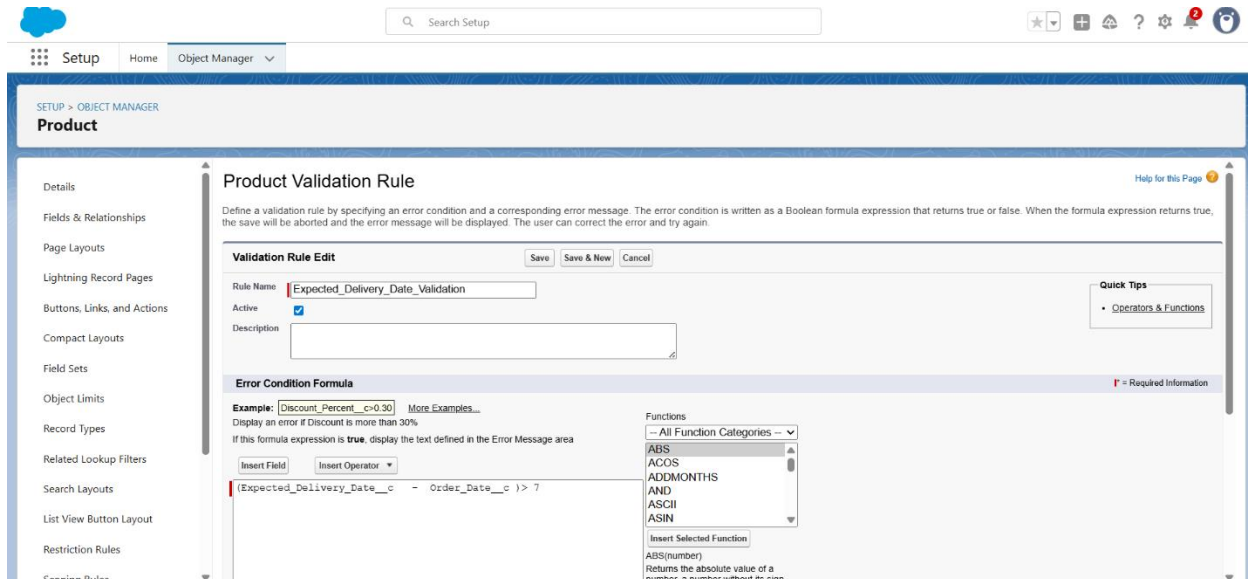
- Created compact layout for product.



- 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 profle.

# Role

- To create a purchasing manager role.

- Created a permission set.



# Flows

- Created Flow to update the Actual Delivery Date.
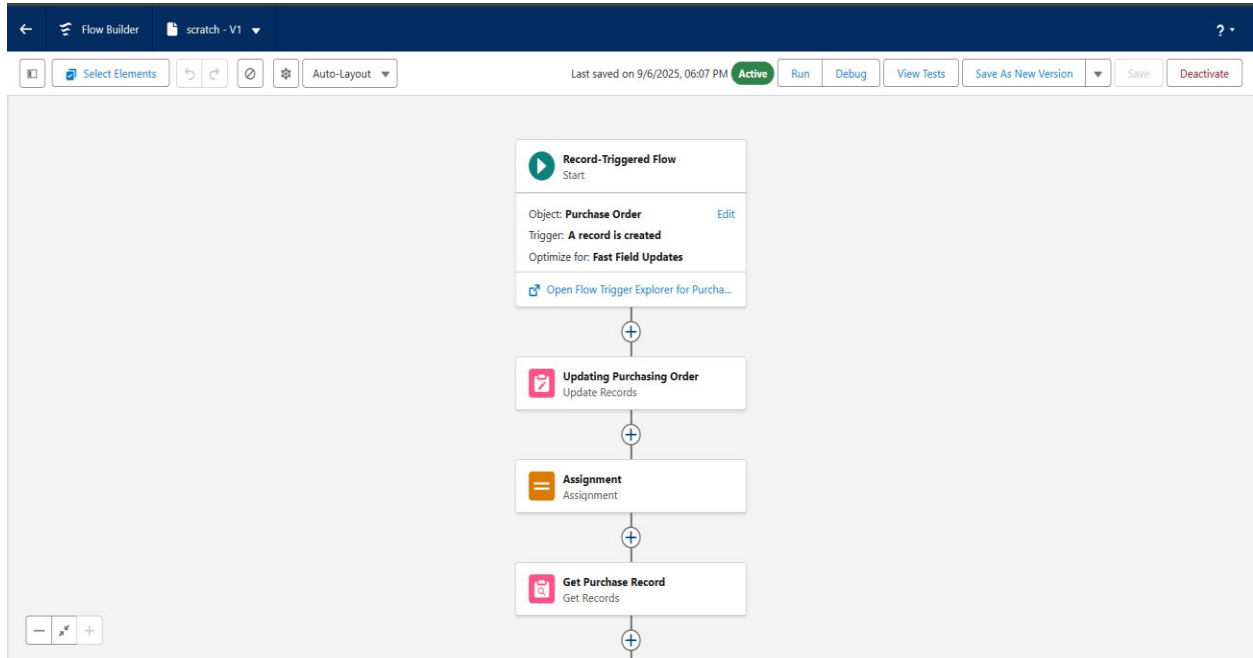
# Apex Triggers

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

# Report

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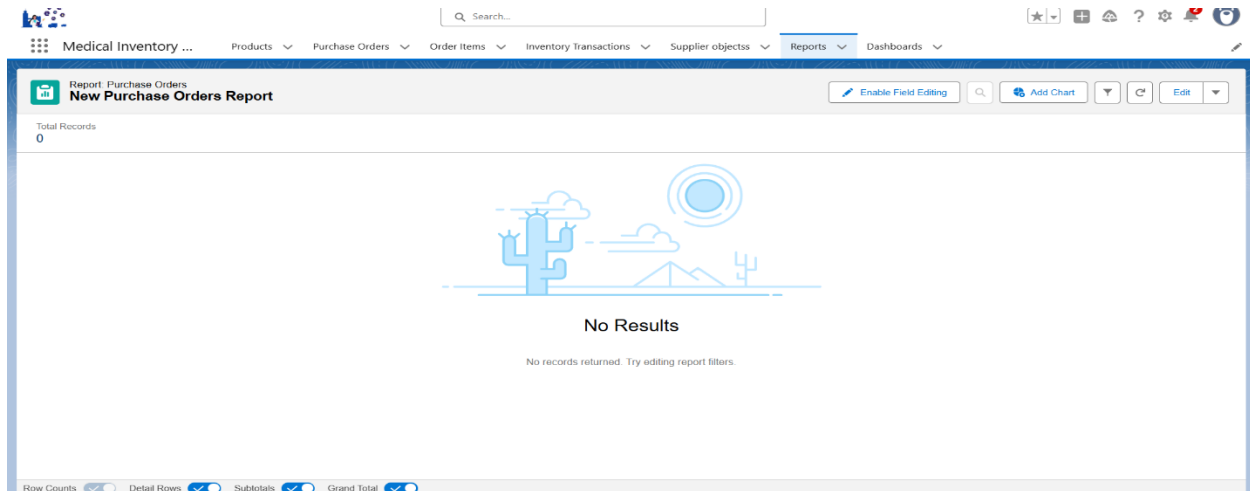


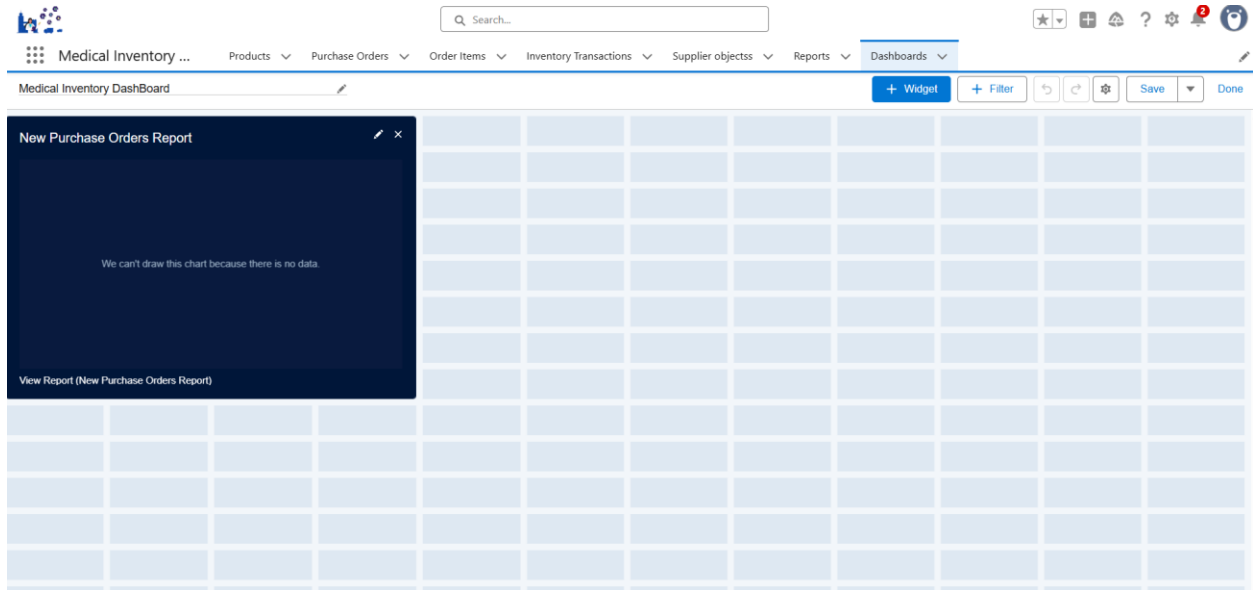- Create a Complete Purchase Details Report
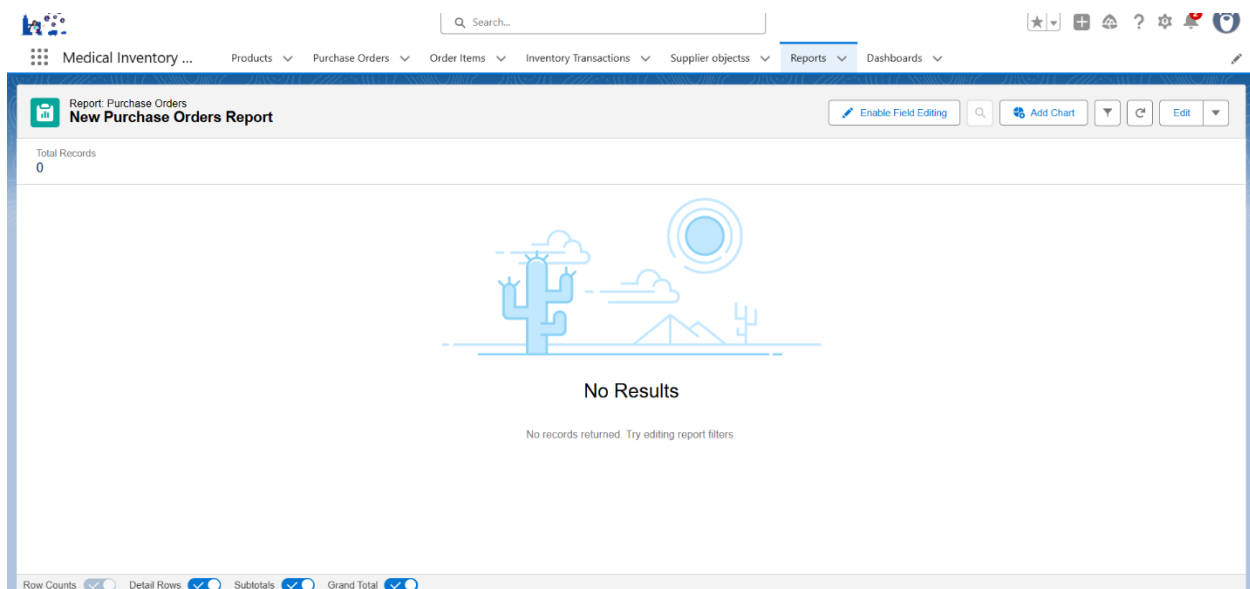


# Dashboard

- Created Dashboard



- To view the dashboard