



Smart  
Internz



**SB8096-Salesforce Developer**

*(Nan Mudhalvan)*

**Project Title : MEDICAL INVENTORY MANAGEMENT**

**Team ID : NM2025TMID02545**

#### **TEAM SIZE(4):**

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## **Project Overview**

The **Medical Inventory Management System** is designed to automate and streamline the process of managing medical supplies, purchase orders, stock levels, and supplier details within a healthcare or pharmacy environment. The system ensures accurate tracking of product information, supplier interactions, inventory transactions, and purchase activities – all within a unified Salesforce platform.

This project leverages Salesforce's automation tools such as **Flows, Validation Rules, Triggers, and Apex Classes** to manage product details, monitor purchase activity, and maintain optimal stock levels. By digitizing manual processes, the system improves operational efficiency and minimizes human errors in inventory control.

## **2. Objective**

The main goal of the Medical Inventory Management System is to provide a **centralized and automated platform** for managing medical product data, supplier relationships, and inventory movements.

### **Business Goals:**

- A. **Automate Inventory Processes:** Create a seamless workflow for tracking purchase orders, supplier details, and product stock updates.
- B. **Optimize Stock Levels:** Prevent overstocking or shortages by maintaining real-time visibility of inventory quantities.
- C. **Improve Supplier Management:** Establish accurate and transparent communication between the purchasing and supplier departments.
- D. **Enhance Decision-Making:** Provide real-time data through reports and dashboards for better forecasting and analysis.
- E. **Reduce Manual Effort:** Use automation, formulas, and triggers to eliminate repetitive tasks and maintain data consistency.

## **3. Salesforce Key Features and Concepts Utilized**

The Medical Inventory Management System uses several Salesforce components and features to efficiently handle the end-to-end medical inventory workflow.

### **Custom Objects**

1. **Product:** Stores detailed information about each medical item such as product name, description, stock level, and unit price.

The screenshot shows the Salesforce Object Manager interface for the 'Product' object. The left sidebar lists various configuration options: 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, and Restriction Rules. The main 'Details' tab displays the following settings:

Setting	Value
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

Buttons at the top right of the details panel are 'Edit' and 'Delete'.

**2. Purchase Order:** Manages purchase-related information like supplier details, order date, and total order cost.

The screenshot shows the Salesforce Object Manager interface for the 'Purchase Order' object. The left sidebar lists the same configuration options as the Product object. The main 'Details' tab displays the following settings:

Setting	Value
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

Buttons at the top right of the details panel are 'Edit' and 'Delete'.

**3. OrderItem:** Tracks individual items purchased within a specific purchase order, including quantity received and price.

The screenshot shows the Salesforce Setup interface for managing objects. The top navigation bar includes tabs for 'Inbox (1,426)', 'All | Purchase Orders | Salesforce', 'Order Item | Salesforce', 'Student', and 'Project content creation'. The main title is 'SETUP > OBJECT MANAGER' followed by 'Order Item'. On the left, a sidebar lists various configuration options under '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, and List View Button Layout. The right panel displays the 'Details' section for the 'Order Item' object. It shows the API Name as 'Order\_Item\_\_c', which is marked as 'Custom'. Other details include: Description, Enable Reports (unchecked), Track Activities (checked), Singular Label ('Order Item'), Plural Label ('Order Items'), Deployment Status ('Deployed'), Help Settings ('Standard salesforce.com Help Window'), and a 'Track Field History' checkbox. At the bottom right are 'Edit' and 'Delete' buttons.

#### 4. Inventory Transaction: Records movements of medical products, including receipts, issues, and adjustments.

This screenshot is identical to the one above, showing the 'Object Manager' for the 'Order Item' object. The left sidebar and right 'Details' panel are exactly the same, indicating no changes have been made to the object's configuration.

#### 5. Supplier: Contains supplier information such as name, contact number, and email.

The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes tabs for 'Inbox (1,426)', 'All | Purchase Orders | Salesforce', 'Supplier | Salesforce', 'Student', and 'Project content creation'. Below the navigation is a search bar labeled 'Search Setup' and a toolbar with various icons. The main area shows the 'SETUP > OBJECT MANAGER' path followed by 'Supplier'. On the left, a sidebar titled 'Details' lists various setup options: 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, and Restriction Rules. The right side displays the 'Details' section for the Supplier object, which includes fields like Description, API Name (Supplier\_c), Singular Label (Supplier), Plural Label (Suppliers), Enable Reports (checked), Track Activities (checked), Track Field History, Deployment Status (Deployed), and Help Settings (Standard salesforce.com Help Window). There are 'Edit' and 'Delete' buttons at the bottom right.

## Relationships

- **Purchase Order → Supplier (Lookup Relationship):**  
Links each purchase order to a specific supplier for clear tracking.
- **Order Item → Purchase Order (Master-Detail Relationship):**  
Ensures each order item belongs to one purchase order and supports roll-up summary calculations.
- **Inventory Transaction → Product (Lookup Relationship):**  
Connects inventory transactions to products for stock tracking.

These relationships ensure accurate data connections and dependency between records.

## Tabs:

Tabs are created in Salesforce to easily access and manage custom object records. In the Medical Inventory Management project, tabs were created for Products, Purchase Orders, Order Items, Inventory Transactions, and Suppliers. This allows users to quickly view, create, and organize records for each module directly from the Salesforce navigation bar.

Custom Object Tabs

Action	Label	Tab Style	Description
Edit   Del	Inventory Transactions	Scales	
Edit   Del	Order Items	Box	
Edit   Del	Products	Stethoscope	
Edit   Del	Purchase Orders	Form	
Edit   Del	Supplier Objects	Factory	
Edit   Del	Suppliers	Building	

Web Tabs

No Web Tabs have been defined

Visualforce Tabs

No Visualforce Tabs have been defined

## Lightning App Development

A Lightning App named *Medical Inventory Management* was created through **App Manager** to organize all the custom objects.

### Tabs Added:

Products, Purchase Orders, Order Items, Inventory Transactions, Suppliers, Reports, Dashboards.

This app provides a single interface for administrators to monitor inventory and purchases efficiently.

App Details & Branding

Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.

App Details

\*App Name: Medical Inventory Management

\*Developer Name: Medical\_Inventory\_Management

Description: Enter a description...

App Branding

Image: Primary Color Hex Value: #60F128

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

App Launcher Preview

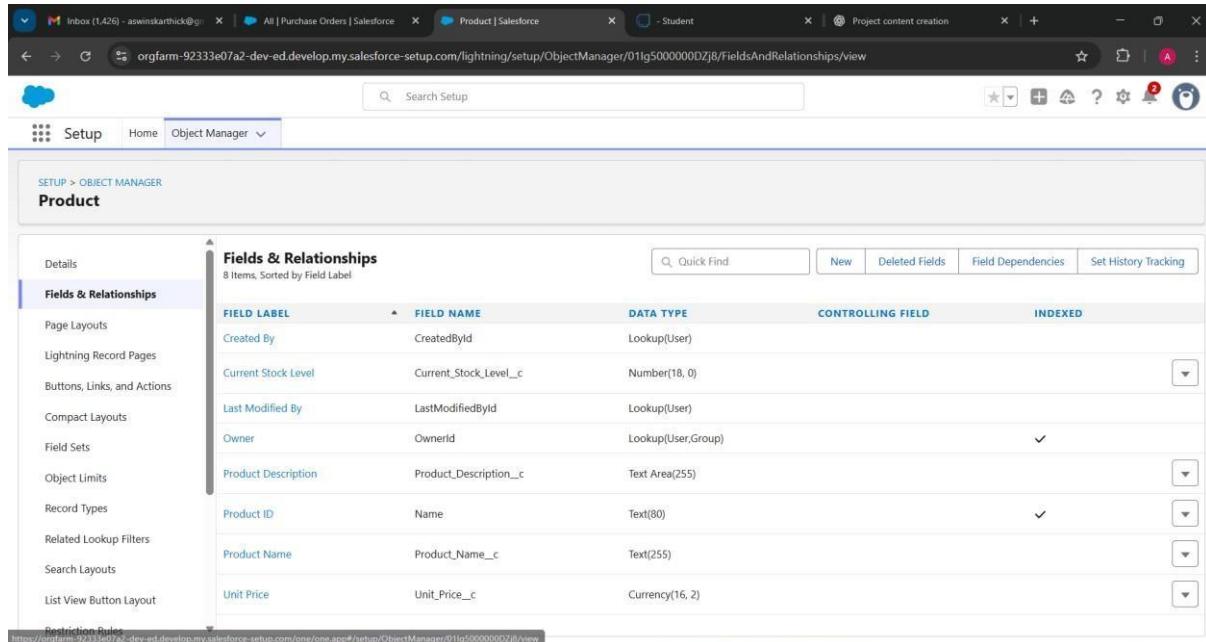
Medical Inventory Manage...

### . Field Configurations and Validation Rules

Key fields and formulas were configured in each object to store relevant information accurately.

## Product Object

These fields allow administrators to monitor inventory availability, calculate product value, and identify which items need to be reordered. They are directly used in inventory transaction and purchase order calculations.

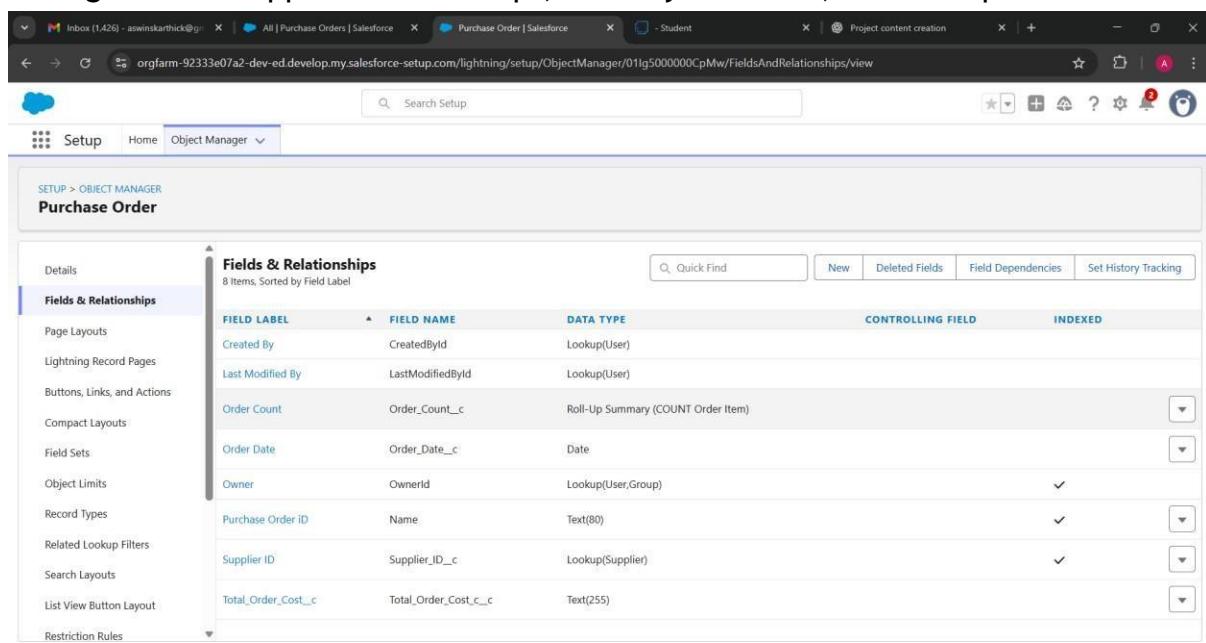


The screenshot shows the Salesforce Object Manager for the 'Product' object. The left sidebar lists various configuration options like Page Layouts, Lightning Record Pages, Buttons, etc. The main area is titled 'Fields & Relationships' and displays eight fields sorted by Field Label. Each field has a 'FIELD LABEL', 'FIELD NAME', 'DATA TYPE', 'CONTROLLING FIELD', and an 'INDEXED' column.

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)		

## Purchase Order Object

This object acts as the main control center for the purchasing process, helping managers track supplier relationships, delivery timelines, and total purchase costs.

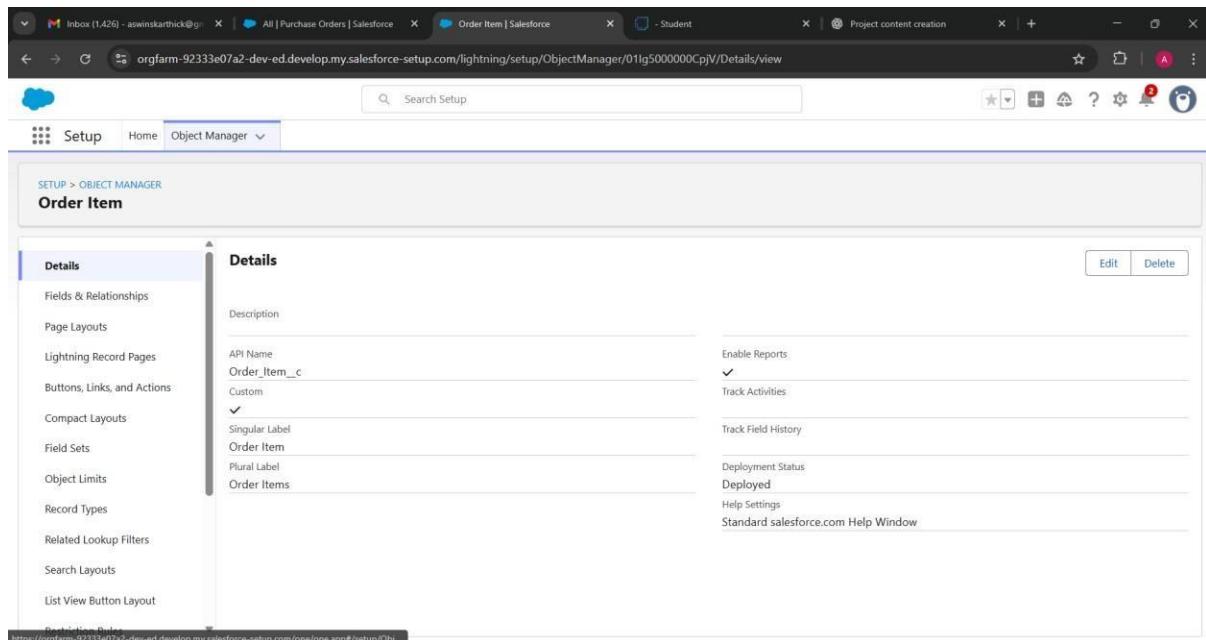


The screenshot shows the Salesforce Object Manager for the 'Purchase Order' object. The left sidebar lists various configuration options. The main area is titled 'Fields & Relationships' and displays nine fields sorted by Field Label. Each field has a 'FIELD LABEL', 'FIELD NAME', 'DATA TYPE', 'CONTROLLING FIELD', and an 'INDEXED' column.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Order Count	Order_Count__c	Roll-Up Summary (COUNT Order Item)		
Order Date	Order_Date__c	Date		
Owner	OwnerId	Lookup(User,Group)		
Purchase Order ID	Name	Text(80)		
Supplier ID	Supplier_ID__c	Lookup(Supplier)		
Total_Order_Cost__c	Total_Order_Cost__c	Text(255)		

## Order Item Object

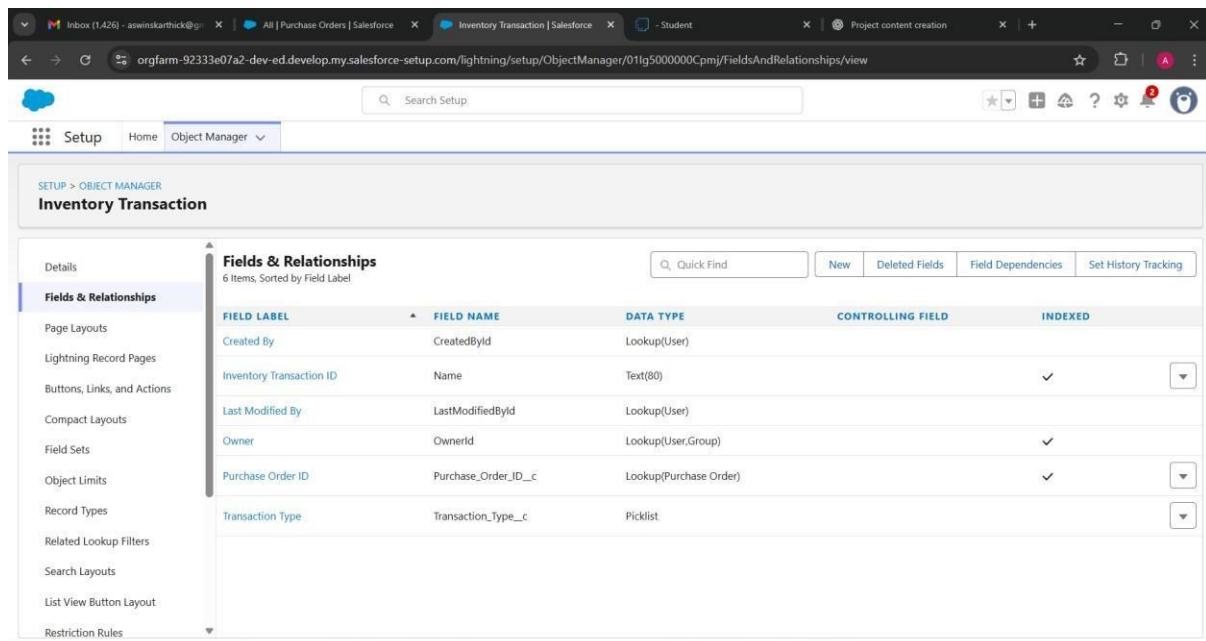
Each order item contributes to the total purchase cost. The data from these fields is aggregated in the **Purchase Order** object to compute total expenditure.



The screenshot shows the Salesforce Object Manager interface for the 'Order Item' object. On the left, a sidebar lists various setup options: 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, and List View Button Layout. The main panel displays the 'Details' section for the 'Order Item' object. It includes fields for Description, API Name (Order\_Item\_\_c), Singular Label (Order Item), Plural Label (Order Items), and several status and tracking fields like Enable Reports (checked), Track Activities, Track Field History, Deployment Status (Deployed), Help Settings, and Standard salesforce.com Help Window. At the bottom right are 'Edit' and 'Delete' buttons.

## Inventory Transaction Object

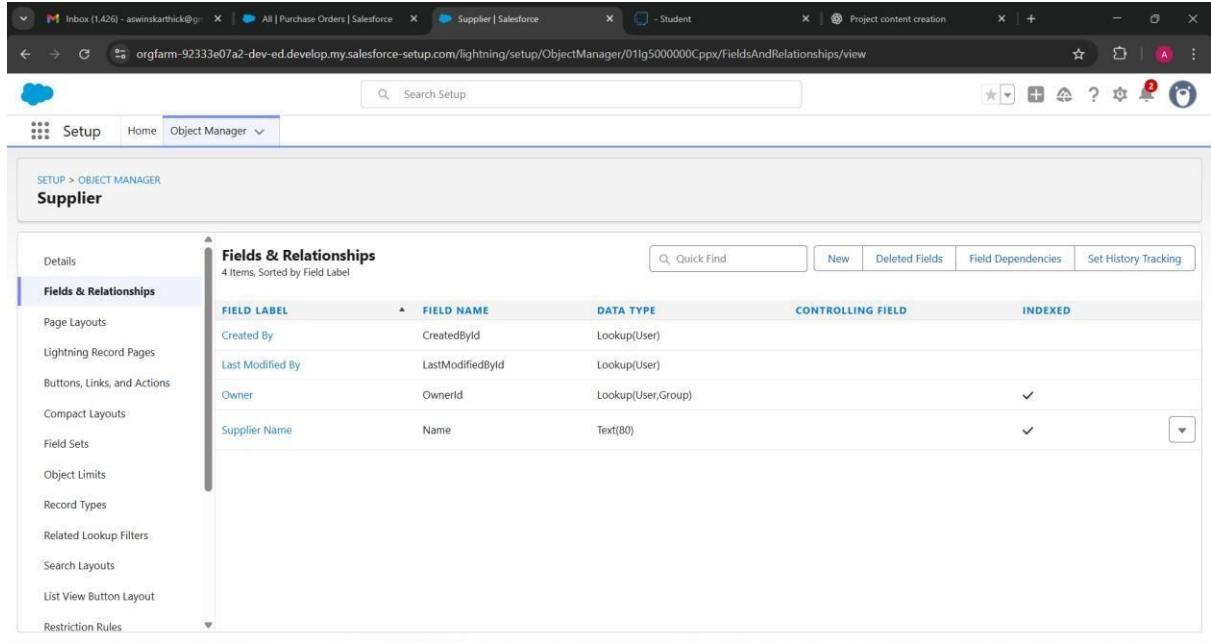
These fields enable full traceability of stock movements, allowing the admin to track whether items were added, issued, or adjusted, ensuring stock integrity.



The screenshot shows the Salesforce Object Manager interface for the 'Inventory Transaction' object. On the left, a sidebar lists various setup options: 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, and Restriction Rules. The main panel displays the 'Fields & Relationships' section for the 'Inventory Transaction' object. It shows a table with columns: FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The table contains six items, sorted by Field Label: Created By (CreatedBy, Lookup(User)), Inventory Transaction ID (Name, Text(80)), Last Modified By (LastModifiedBy, Lookup(User)), Owner (OwnerId, Lookup(User,Group)), Purchase Order ID (Purchase\_Order\_ID\_\_c, Lookup(Purchase Order)), and Transaction Type (Transaction\_Type\_\_c, Picklist). A 'Quick Find' search bar and buttons for New, Deleted Fields, Field Dependencies, and Set History Tracking are at the top of the table.

## Supplier Object

Maintains an up-to-date supplier directory that supports lookup relationships with purchase orders. These fields enable automatic communication and accurate supplierbased reporting.



The screenshot shows the Salesforce Object Manager interface for the 'Supplier' object. The left sidebar has 'Fields & Relationships' selected. The main area is titled 'Fields & Relationships' and lists four items: 'Created By', 'Last Modified By', 'Owner', and 'Supplier Name'. The 'Owner' field is highlighted with a checkmark in the 'INDEXED' column. The table columns are: FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED.

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 Name	Name	Text(80)		✓

## Page Layouts:

Editing **Page Layouts** in Salesforce helps organize how fields, sections, and related lists appear on record pages for better clarity and data entry.

In the **Medical Inventory Management** project, page layouts were customized for **Product, Purchase Order, Order Item, Inventory Transaction, and Supplier** objects. Fieldssuchas**OrderDate, TotalOrderCost, SupplierID, Product Name, and Unit**

**Price** were properly arranged for a clean and structured view.

Some important fields like **Order Date** were marked as *Required*, while calculated fields such as **TotalOrderCost** were set as *Read-Only*to maintain data accuracyand prevent manual modification.

These layout edits make data management easier and improve user experience across all modules.

Cloud icon

Setup Home Object Manager

SETUP > OBJECT MANAGER  
**Supplier**

Details  
Fields & Relationships  
**Page Layouts**  
Lightning Record Pages  
Buttons, Links, and Actions  
Compact Layouts  
Field Sets  
Object Limits  
Record Types  
Related Lookup Filters  
Restriction Rules  
Scoping Rules

Save Quick Save Preview As... Cancel  Layout Properties

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

Quick Find Field Name:

Section	Created By	Phone Number
Blank Space	Rating	Supplier Name
Address	Last Modified By	
Contact Number	Owner	

**Supplier Detail**

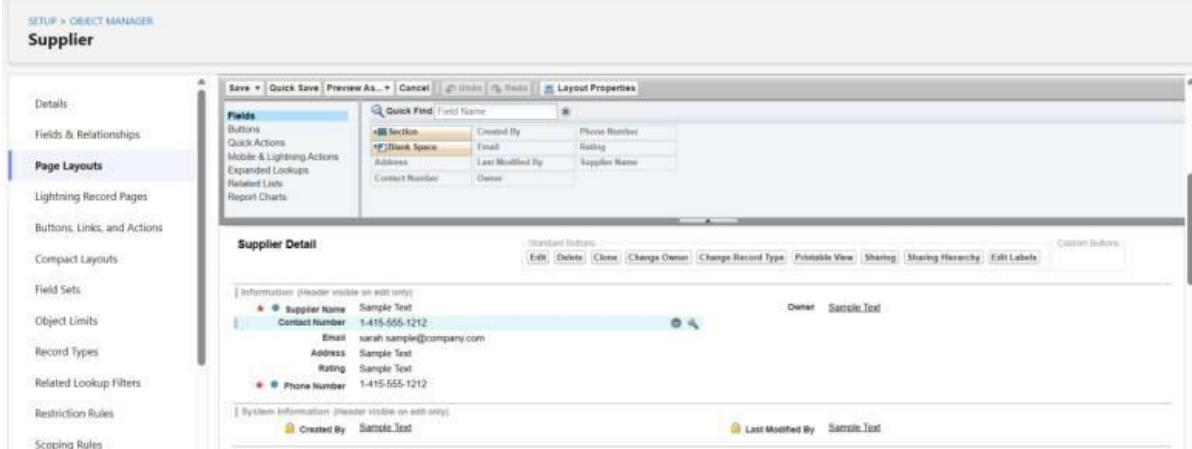
Standard Buttons: Edit Delete Close Change Owner Change Record Type Printable View Sharing Sharing Hierarchy Edit Labels Custom Buttons

Information (Header visible on edit only):  
★ Supplier Name: Sample Text  
Contact Number: 1-415-555-1212  
Email: sarah.sample@company.com  
Address: Sample Text  
Rating: Sample Text  
★ Phone Number: 1-415-555-1212

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):



Cloud icon

Setup Home Object Manager

SETUP > OBJECT MANAGER  
**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

Save Quick Save Preview As... Cancel  Layout Properties

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

Quick Find Field Name:

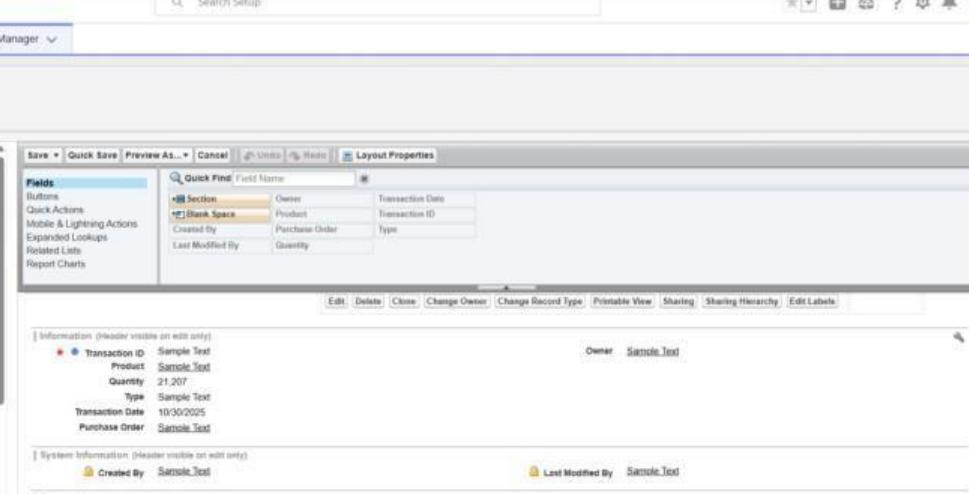
Section	Owner	Transaction Date
Blank Space	Product	
Created By	Purchase Order	Type
Last Modified By	Quantity	

**Information (Header visible on edit only):**  
★ Transaction ID: Sample Text  
Product: Sample.Text  
Quantity: 21.207  
Type: Sample.Text  
Transaction Date: 10/30/2025  
Purchase Order: 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):**



Setup Home Object 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

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

Quick Find Field Name: Order Item ID

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

Action Item Detail Standard Buttons Edit Delete Close 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  
System Information (Header visible on edit only): Created By Sample Text Last Modified By Sample Text  
Custom Links (Header visible on edit only):

This screenshot shows the 'Order Item' page layout configuration in the Salesforce Setup interface. The left sidebar lists various setup categories like Details, Fields & Relationships, and Page Layouts. The 'Page Layouts' section is selected. The main area shows the 'Order Item Detail' layout with standard buttons like Edit, Delete, and Close. It includes sections for Information (with Order Item ID), System Information (with Created By and Last Modified By), and Custom Links. A 'Quick Find' bar at the top allows searching by field name.

Setup Home Object Manager

SETUP > OBJECT MANAGER Purchase Order

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

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

Quick Find Field Name: Order Date, c

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

Action Item Detail Standard Buttons Edit Delete Close Change Owner Change Record Type Printable View Sharing Sharing Hierarchy Edit Labels Custom Buttons

Information (Header visible on edit only): Supplier ID Sample Text Purchase Order ID Sample Text Order Date 10/30/2025 Total Amount \$123.45 Quantity Received 43 Unit Price, c \$123.45 Total Amount \$123.45 Expected Delivery Date 10/30/2025 Order Date, c 10/30/2025  
System Information (Header visible on edit only): Created By Sample Text Last Modified By Sample Text  
Custom Links (Header visible on edit only):

This screenshot shows the 'Purchase Order' page layout configuration in the Salesforce Setup interface. Similar to the Order Item layout, it includes sections for Information (Supplier ID, Purchase Order ID, Order Date, Total Amount, Quantity Received, Unit Price, Expected Delivery Date, Order Date), System Information (Created By, Last Modified By), and Custom Links. The 'Quick Find' bar at the top is set to search for 'Order Date, c'.

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

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

Quick Find Field Name: Current Stock Level, e

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

Action Item Detail Standard Buttons Edit Delete Close Change Owner Change Record Type Printable View Sharing Sharing Hierarchy Edit Labels Custom Buttons

Information (Header visible on edit only): Products ID Sample Text Product Name Sample Text Purchase Description Sample Text Supplier ID Sample Text Unit Price \$123.45 Expiry Date 10/30/2025 Order Date 10/30/2025 Current Stock Level 37.747 Product Description 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):

This screenshot shows the 'Product' page layout configuration in the Salesforce Setup interface. It follows a similar structure to the others, with sections for Information (Products ID, Product Name, Purchase Description, Supplier ID, Unit Price, Expiry Date, Order Date, Current Stock Level, Product Description), System Information (Created By, Last Modified By), and Custom Links. The 'Quick Find' bar at the top is set to search for 'Current Stock Level, e'.

## Profiles and Permission

### Sets □ Profiles

#### Created:

- *InventoryManager* – Access to product and inventory objects.

The screenshot shows the Salesforce Setup interface with the 'Profiles' page selected. The profile 'Inventory Manager' is displayed, which includes the following details:

- Profile Detail:** Name: Inventory Manager, User License: Salesforce, Description: Not assigned, Created By: Aswin karthick, Modified By: Aswin karthick.
- Page Layouts:** Standard Object Layouts for various objects like Global, Email Application, Home Page Layout, Account, Alternative Payment Method, etc., with their respective page layout assignments.

- *Purchase Manager* – Access to purchase order and supplier objects.

The screenshot shows the Salesforce Setup interface with the 'Profiles' page selected. The profile 'Purchase Manager' is displayed, which includes the following details:

- Profile Detail:** Name: Purchase Manager, User License: Analytics Cloud Integration User, Description: Not assigned, Created By: Aswin karthick, Modified By: Aswin karthick.
- Page Layouts:** Standard Object Layouts for various objects like Global, Email Application, Home Page Layout, Account, Alternative Payment Method, Appointment Invitation, Asset, etc., with their respective page layout assignments.

- **Permission Set:**

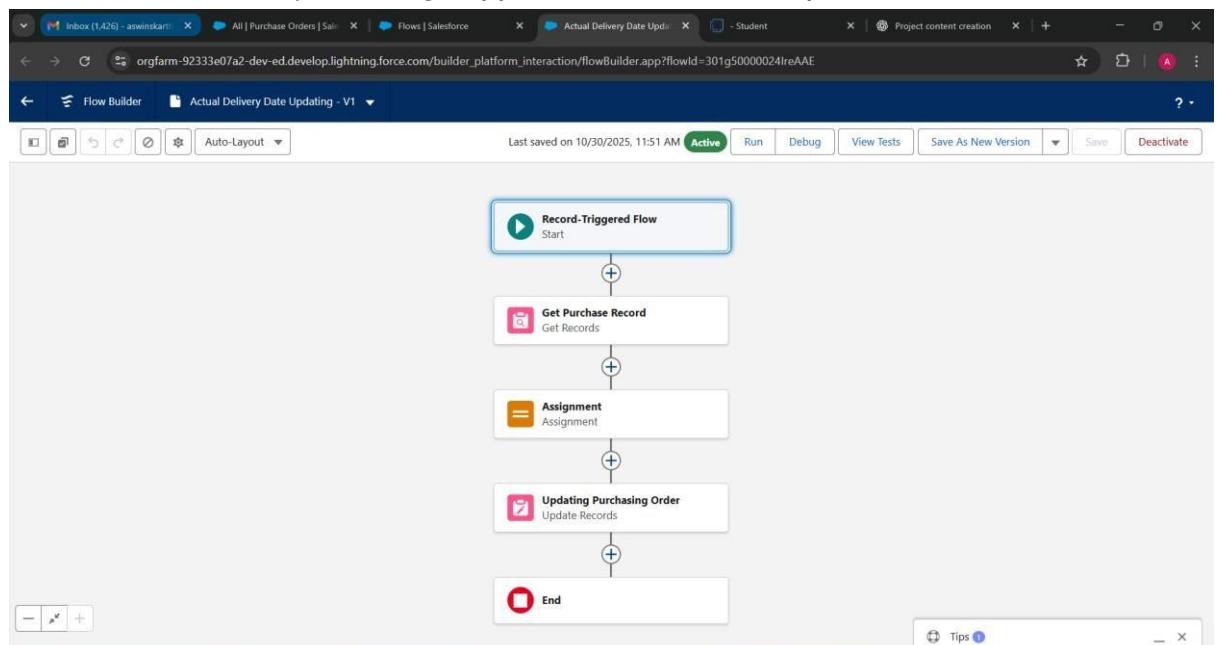
**PurchaseManagerCreateAccess** — Allows creation of Order Items and visibility of related records.

Action	Permission Set Name	Description	License
<input type="checkbox"/> Close	Partner Connect Part...	Set up Partner Conn...	Salesforce
<input type="checkbox"/> Close	Payments Administra...	Has all the user per...	Salesforce Payne...
<input type="checkbox"/> Close	Prompt Template Ma...	Manage prompt fe...	Einstein Prompt T...
<input type="checkbox"/> Close	Prompt Template Us...	Run prompt templ...	Einstein Prompt Tem...
<input type="checkbox"/> Close	PromptTemplatePer...	Access the Core A...	Cloud Integration User
<input type="checkbox"/> Del   Clone	Purchase Manager		

## . Automations and Flows

- Flow – Actual Delivery Date Automation:**

A Record-Triggered Flow automatically updates the *ActualDeliveryDate* field to be 3 days after the *Order Date*. This ensures delivery tracking happens without manual updates.



- Formula Fields:**

In the **OrderItem** object, an **Amountformula** field calculates:

**Quantity\_Received c \* Unit\_Price \_\_c**

LABEL	API NAME	PRIMARY	MODIFIED BY	LAST MODIFIED
Product Compact Layout	Product_Compact_Layout		Aswin karthick	10/29/2025, 2:08 AM
System Default	SYSTEM	✓		

## Apex Trigger and Handler

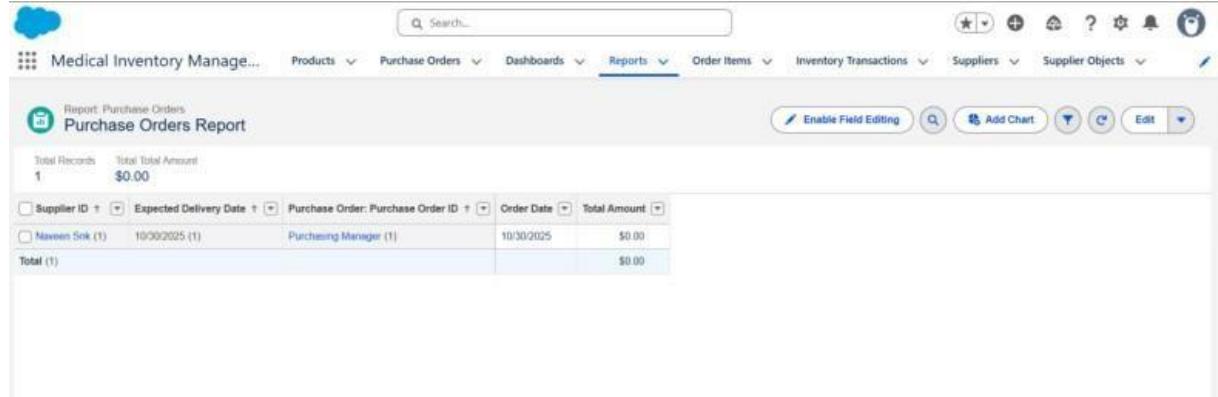
An **Apex Trigger and Handler Class** were created to automatically calculate the **Total OrderCost** whenever Order Items are inserted, updated, or deleted.

```
1 // trigger CalculateTotalAmountTrigger on Order_Item__c (after insert, after update, after delete, after undelete) {
2
3     // Call the handler class to handle the logic
4
5     CalculateTotalAmountHandler.calculateTotal(Trigger.new, Trigger.old, Trigger.isInsert, Trigger.isUpdate, Trigger.isDelete, Trigger.isUn
6
7 }
8
9
10 Step 4:
11 i) In the Developer Console window, go to the top menu and click on "File".
12
13 ii) Select New: From the dropdown menu under "File", select "New".
14
15
16 iii) Choose Apex Class: Name it as CalculateTotalAmountHandler
17
18
19
20
21
22
23
24
```

## Reports:

## 1. Purchase Orders based on Suppliers

A summary report grouping records by Supplier ID and Purchase Order ID, displaying Order Count and Total Order Cost.

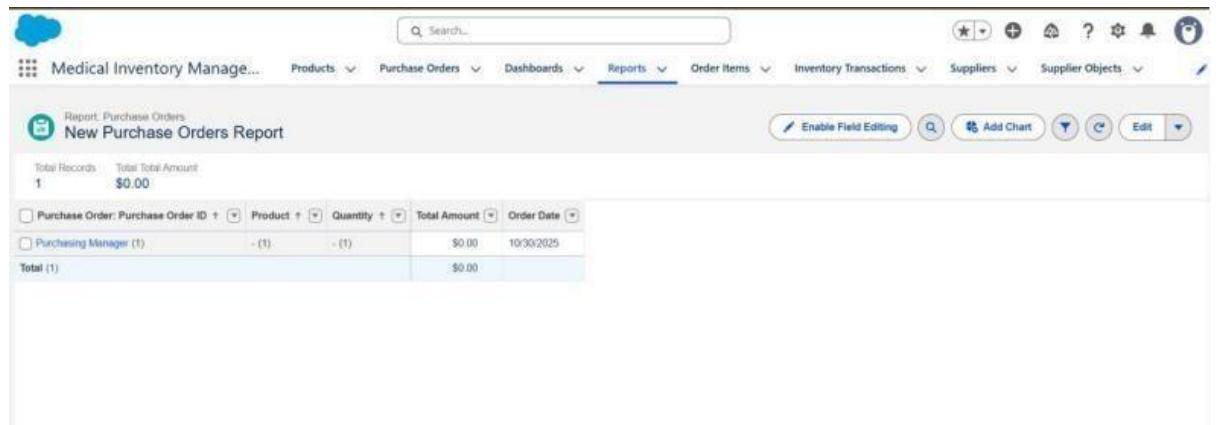


The screenshot shows a report titled "Purchase Orders Report" with the sub-title "Report: Purchase Orders". The interface includes a search bar and various navigation tabs like Products, Purchase Orders, Dashboards, Reports, Order Items, Inventory Transactions, Suppliers, and Supplier Objects. The report table has columns for Supplier ID, Expected Delivery Date, Purchase Order ID, Order Date, and Total Amount. One record is listed: Naveen Sank (1) with an order date of 10/30/2025 and a total amount of \$0.00.

Supplier ID	Expected Delivery Date	Purchase Order: Purchase Order ID	Order Date	Total Amount
Naveen Sank (1)	10/30/2025 (1)	Purchasing Manager (1)	10/30/2025	\$0.00
Total (1)				\$0.00

## 2. Complete Purchase Details Report

A detailed report combining Purchase Orders, Order Items, and Products with grouped columns for Supplier, Product, Quantity, and Amount.

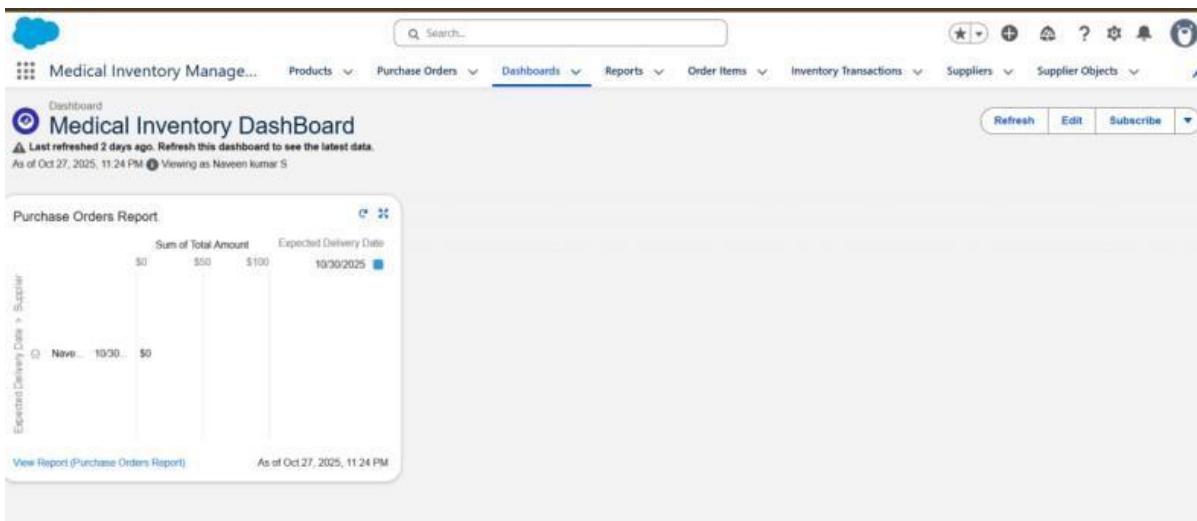


The screenshot shows a report titled "New Purchase Orders Report" with the sub-title "Report: Purchase Orders". The interface includes a search bar and various navigation tabs. The report table has columns for Purchase Order ID, Product, Quantity, Total Amount, and Order Date. One record is listed: Purchasing Manager (1) with a quantity of - (1), a total amount of \$0.00, and an order date of 10/30/2025.

Purchase Order: Purchase Order ID	Product	Quantity	Total Amount	Order Date
Purchasing Manager (1)	- (1)	- (1)	\$0.00	10/30/2025
Total (1)			\$0.00	

## Dashboard:

A dashboard named *MedicalInventoryDashboard* visualizes purchase data, supplier performance, and total order cost using charts and tables derived from reports.



## 11. Key Scenarios Addressed by Salesforce

### 1. Inventory Accuracy:

Automate tracking of stock levels and transactions to prevent shortages.

### 2. Supplier Management:

Centralizes supplier data with email and phone contact integration.

### 3. Purchase Monitoring:

Enables managers to view real-time order progress through reports and dashboards.

### 4. Automated Calculations:

Formula fields and triggers keep cost data updated automatically.

### 5. Role-Based Access:

Profiles and permission sets control which users can create or edit records.

### 6. Data Validation:

Validation rules prevent incorrect delivery date entries and ensure reliable data.

## 12. Conclusion

The **Medical Inventory Management System** successfully automates the core functions of a medical procurement and inventory process using Salesforce.

Medical Inventory Manage... Products Purchase Orders Dashboards Reports Order Items Inventory Transactions Suppliers Supplier Objects

Dashboard Medical Inventory DashBoard Last refreshed 2 days ago. Refresh this dashboard to see the latest data. As of Oct 27, 2025, 11:24 PM Viewing as Naveen kumar S

Purchase Orders Report

Sum of Total Amount Expected Delivery Date

\$0 \$50 \$100 10/30/2025

Nave... 10/30... \$0

View Report (Purchase Orders Report) As of Oct 27, 2025, 11:24 PM