Project Name – MEDICAL INVENTORY MANAGEMENT

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MEDICAL INVENTORY MANAGEMENT

INTRODUCTION

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.

PREJECT 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.

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Milestone – 1

Salesforce Account

Activity 1: Creating Developer Account

1. Creating a developer org in salesforce.
2. Go to https://developer.salesforce.com/signup
3. On the sign up form, enter the following details :
    - First name : MONIKA
    - Last name MIRIYALA
    - Job Title : Developer
    - Work Email :monishyam2623578@agentforce.com
    - Company : GAYATRI DEGREE COLLEGE TIRUPATI
    - Country/ Region : INDIA

4. Click on sign me up after filling these.

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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.

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

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Milestone 2

Objects Creation

Activity 1: Creating a Product Object

1. From the setup page

2. Click on Object Manage
3. Click on Create >> Click on Custom Object.

4. Enter the label name as **Product**

5. Enter Plural label name as **Products**

6. Enter Record Name as **Product ID**

7. Select Data Type as **Text**

8. Select Allow reports.

9. Select Allow Search.

10. Click on Save and New

Activity 2 : Creating purchase order

1. From the setup page
2. Click on Object Manager
3. Click on Create >>Click on custom object

4. Enter the label name and Purchase order
5. Enter Plural label name as Purchase orders
6. Enter object Name as Purchase order

7. Select Data Type as Text
8. Select allow reports.

9. Select Allow search
10. Click on Save and New

Activity 3: Create a Order Item

1. From the setup page
2. Click on Object Manager
3. Click on Create >>Click on Custom object

4. Enter the label name as Order Item
5. Enter Plural label name as Order Items
6. Enter Object name as Order_item
7. Select Data Types as Text

8. Select Allow reports

9. Select Allow search
10. Click on Save and New

Activity 4 : Create a Inventory Transaction

1. Form the Setup page
2. Click on Object Manager
3. Click on Create >>Click on Custom Object.

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4. Enter the label name as **Inventory Transaction**

5. Enter the Plural name as **Inventory Transactions**

6. Enter the Object name as **Transaction ID**

7. Select **Allow reports**

8. Select **Allow search**

9. Click on **Save &New**

Activity 5: Create a Supplier Object

1. From the **Setup Page**
2. Click on **Object Manager**

3. Click on Create >> Click on Custom Object
4. Enter the label as **Supplier**
5. Enter the plural as **Suppliers**

6. Enter Record name as **Supplier ID**
7. Select Data type as **Text**
8. Select Allow **reports**.

9. Select **Allow search**.
10. Click on **Save&New.**

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Milestone -3
Tabs creation

Activity 1 : Creating a Tab for Product Object

1. Go to the setup page >>type Tabs in Quick Find Bar

2. Click on Tabs

3. Cilck 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 defult >> 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

Activity 2 : Creating a Tabs for Purchase Order

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 (pruschae order) >> 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
5. Make sure that the Append tab to user's existing personal customizations is checked
6. Click save

Activity 3 : Creating a Tab for

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 (Order Item) >> 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

Activity 4 : Creating a Tabs for Inventory Transaction

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 (Inventory Transaction)

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

Activity 5 : Creating a Tab for Supplier

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 (supplier) >> 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

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Milestone 4

The Lightning App

Activity : 1 . Creating a Lightning app for Medical Inventory Management

1. From setup , enter App Manager in the Quick Find and Select App Manger
2. Click New Lightning App

3. Enter Medical Inventory Management as the App Name >> Click on upload image and add an image related to Medical Inventory then click next
4. Under App Options , leave the default selections and click next.
5. Under Utility Items , leave as is and click next

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

7. From Available Profiles , Select System Administrator and move it to Selected profiles.
8. Click Save & Finish

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Milestone : 5

Field Creation

Creating Fields in Product Object:

Object	Field Name	Data Type
Product	Product ID(Standard)	Text
	Product Name	Text
	Product Description	Text Area
	Minimum Stock Level	Number(18, 0)
	Current Stock Level	Number(18, 0)
	Unit Price	Currency(16, 2)
	Expiry Date	Date

Activity 1 : Creating a Text Field In Product 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

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6. Select Text field , click Next

7. Enter Field Label as “Product Name “ and Length 255
8. Select Required Field
9. Click Next , Next , then Save & New

Activity 2 : Creating a Text Area Field in Product 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 Text Area field , Click Next

7. Enter Field Label as " Product Description "
8. Click Next , Next , then Save & New

Activity 3 : Creating a Number Field in Product Object

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

Activity 4 : Creating a Currency Field in Product Object

1. Go to setup >> click on Object Manager >> type object name (product) in quick find box >> click on the Product custom object
2. Now click on " Fields & Relationships "
3. Click on New
4. Select Data type as " Currency " and click Next

5. Enter Field Label as " Unit Price "
6. Length - 16 , Decimal Places -2
7. Select Required Field
8. Click on Next , Next and Save

Activity 5 : Creating Lookup Relationship in Purchase Order Object

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 , aloowing the child object to reference the parent object .

To create a relationship from Purchase order to Supplier
1. Go to the Setup page >> click on object manager >> type object name (purchase order) in the Quick Find bar >> click on the purchase Order Object
2. Click on Fields & Relationship
3. Click on New
4. Select " Lookup relationship " as Data type and click Next

5. Select the related object " Supplier "

6. Click on Next
7. Give Field Label as " Supplier ID "

8. Select Required Field
9. Click on Next , Next , Next , Save

Activity 6 : Creating a Date Field in Purchase Order Object

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 types as " Data" and click Next

5. Enter Field Label as " Order Date "
6. Click on Next , Next , Next amd Save

Activity 7 : Creating a Roll -up Summary Field in Purchase Order Object

1. Go to setup >> Click on Object Manager >>type object name(Purchase Order) in quick find box >> click on the Puechase Order object.
2. Now click on "Field & 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 item”.
7. For Select Roll-Up Type select “Count”.

8. Click on Next,Next & Save.

Activity 8 : Creating a Unit Price Formula Field in Item 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 " Field & Relationships"
3. Click on New
4. Select Data as "Formula" and click Next
5. Enter field label Units Price.
6. Select formula return type Currrncy, Click Next
7. Create and insert Advance formula: Product_ID__r.Unit_Price__c.

*

8. Click Next,Next,then Save.

Activity 9: Creating a Amount Formula Field in Order Item Object

1. Go to setup >> click on object Manager >> type object name (Order Item) in quick find box > > click on the Order Itam 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.
7. Create and insert Advance formula: Quantity_Received_c * Unit_Price_c

8.Click Next,Next,then Save.

Activity 10 : Creating a Picklist Field in Inventory Transaction Object

1. Go to setup >> click on Object Manager >>type object name (Invontory Transaction) in quick find bpx >>click on the inventory Transaction Object.
2. Now click on “Field Relationship”.
3. Click on New.
4. Select Data type as “Picklist” and click naxt.
5. Enter Field Label as “Transaction Type”.
6. In value select “Enter value with each value seperated by a new line” and enter values as show below.

   Receipt
   Issue
   Adjustment

7. Click on Next,Next and Save.

Activity 11 : Creating a total Order Cost Formula Field in inventory Transaction 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 " Field & Relationship"
3. Click on New.
4. Select Data type as "Formula" and click Next.

5.Enter Field label Total Order Cost .
5. Select formula return type Currency,Click Next
6. Create and insert Advance formula:
Purchase_Order_ID__r.Total_Order__Cost__c

7. Click Next, Next,then Save.

> Creating A Phone Field In Supplier Object

Supplier	Supplier ID(Standard)	Text
	Supplier Name	Text
	Contact Person	Text
	Phone Number	Phone
	Email	Email
	Address	TextArea

Activity 1: Creating a Text Field in Supplier object

1. Go to setup >> click on Object Manager >> type object name (Supplier)I in quick find box >> click on the Supplier object.
2. Now click on “Fields & Relationship “
3. Click on new
4. Select Data type as “Phone” and click Next

5.Enter the label as “Phone Number “.
6.Select Required Field.

8. Click on Next,Next and save.

Activity 13: Create A Email Field In Supplier Object

1. Go to setup >> click on object Manager >> type object name(Supplier) 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 “Email “ and Click Next.
5. Enter the Field Label as “Email”.
6. Click on Next , Next and Save.

Step 2. Enter the details
Step 2 of 4
Previous
Next
Cancel
Field Label
Email
5
6
Field Name
Email
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
Auto add to custom report type
Add this field to existing custom report types that contain this entity
Default Value
Show Formula Editor

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Milestone 6

Editing of Page Layouts

Activity 1 : To Edit a Page Layout in Product Object

1. Go to setup >> click on Object Manager >>type object name (Product) in quick find box >>click on the product object >> Page Layouts.
2. Click on the Product Layout.
3. Drag and Arrange the field as shown below.
4. Click on save.

Activity 2 : To Edit a page Layout in Purchase Order Object

1. Go to setup page >> 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

1. Go to setup page >>click on object Manager >> type object name (Order Item) in quick find box >> click on the Order Item Object >> Page layouts
2. Click on the Order Item Layout
3. Drag and Arrange the field as shown below.
4. Click Save.

Activity 4 : To Edit a Page Layout in Inventory Transaction Object

1. Go to setup page >> click on Object Manager >> type Object Name (Inventory Transaction) in quick field 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

1. Go to setup page >> click on Object Manager >> type Object Name (Supplier) in quick find box >> click on the supplier object >> Page Layouts.
2. Click on the Supplier Layout.
3. Drag and Arrange the field as shown below.
4. Click Save.

Milestone 7

Compact Layouts

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

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 Field : Select Product name , Unit Price , Cuurent Stock Level.
6. Click Save.

7. Click Compact Layout Assignment.
8. Click Edit Assignment.
9. Choose "Product Compact Layout " from the dropdown.
10. Click Save.

Activity 2 : To Create a Compact Layout to a Purchase Order Object

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 drop down.
10. Click Save

Milestone 8

Validation Rules

Activity 1 : To Create an Expected Delivery Date Validation Rule To a Employee 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. Click on the Validation rule >> click on New.
3. Enter the Rule name as " Expected Delivery Date Validation".
4. Select Active.
5. Insert the Error Condition Formula as : (Expected_Delivery _Date__C - Order_Date__c)>7

6. Enter the Error Message as " The Expected Delivery Date should not exceed 7 days ".
7. Select the Error Location as Top of Page
8. click Save

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Milestone 9

Profiles

Activity 1 : To Create an Inventory Manager Profile

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

1. While still on the profile page , then click Edit.
2. Select the custom App settings as default for the Medical Inventory Management.

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

4. Change the password policies as mentioned :
5. User passwords expire in should be " never expires ".
6. Minimum password length should be "8", and click Save.

Activity 2 : To Create an Purchase Manager Profile

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 setting as default for the Medical Inventory Management.

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

5. Change the password policies as mentioned.
6. User passwords expire in should be " never expires ".
7. Minimum password length should be "8 " , and Click Save.

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Milestone 10

Roles

Activity 1 : Create a Purchasing Manager Role

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

2. Click on Expand All and click on add role under SVP, Sales & Marketing role.
3. Give Label as " Purchasing Manager " and Role name gets auto populated . Then click on Save.

Activity 2 : Create a Purchasing Manager Role

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

2. Click on Expand all and click on add role under SVP,Sales & Marketing role .
3. Give Label as "Inventory Manager " and the role name gets auto populated.Then click on Save.

Milestone 11

Users

Activity 1 : Create a Purchasing Manager User

1. Go to setup >>type users in quick find box >> Select Users >>click on New User.

2. Enter the First Name -John , Last Name - Purchase M and (Your) email address and a unique username in the form of an email address. By default , the username is the same as the email address.
3. Select Role as Purchasing Manager.
4. Select a User License as Salesforce.

NOTE : As Salesforce license can only be used by 2 Users at a time in Dev Org, SO if you don't find a Salesforce license then deactivate a user who has a Salesforce license or change the license type from Salesforce to any other.

5. Select a profile as Purchase Manager.
6. Check Generate new password and notify the user immediately to have the user's login name and a temporary password emailed to your email.

7. Click on Save.

Activity 2 : Create an Inventory Manager User.

1. GO to setup >> type users in Quick find box>>Select Users >>click on New User.

2. Enter the First Name-Krishna and(Your) email address and a unique username in the from of an email address.By default,the username is the same as the email address.

3. Select Role as Inventory Manager.
4. Select a User License as salesforce.
5. Select a profile as Inventory Manager.

6. Check Generate new password and notify the user immediately to have the user's login name and a temporary password emailed to your email.
7. Click on save.

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Milestone 12
Permission Set

Activity 1 : Create a Permission Set

1. Go to setup >> type Permission in quick find box >> Select Permission Set>>click on New.
2. Enter Label as Purchase Manager Create Access >>click on save.

3. From Object Settings >> Select Order item >>Enable for both tab Available and Visible >> Enable Read and Create in Object Permissions >> click on Save.

4. Navigate to the Permission Set detail page >> Click Manager Assignment >> click Add Assignment >>Select the user John PurchaseM to assign the permission set to and click Next.

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

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Milestone 13
Flows creation
Activity 1 : Create Flow TO Update The Actual Delivery Date

1. Go to set up >> type Flow in Quick find box>> Click on the Flow and Select the New Flow >> Start From Scratch.

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

3. Under Object select “Purchase Order”
4. Select a record is create or updated.
5. Set Entry Condition :None
6. Select Fast Field Updates and click on Done.

7. Under the record trigger flow click on the "+" icon and select Get RECORDS.
8. Enter Label as " Get Purchase Records ".
9. For Object select Purchase Records.
10. For Condition Requirement.Select All Condition are Met(AND)

    For the first condition select as follows:

    Field : Id

    Operatoe:Equals

    Value: {!$Record.Id}

11. For How many Records to store Select Only the First Record.
12. For How to Store Record Data select Choose fields and let Salesforce do the rest. Select Field : Order_Date__c. Click on Done.

13. In the Flow Builder, click on the Manager tab on the left-hand side >> Click on New Resource >> In the Resource Type drop down, select Variable.
14. Enter API name as Date >> Click on Done.
15. From the Toolbox drag and Assignment element.
16. Enter the Label as “Assignment”.

17. Set Variable Values :

a . Variable : {!ActualDeliveryDate}

Operator: Equals

Value : {!$Record.Order_Date__c}

b . Variable : {!ActualDeliveryDate}

Operator : Add

Value : 3

18. Click Done
19. From the Toolbox drag and drop update Records element and connect to the Assignment element.
20. Enter the label as “Updating Purchasing Order”.
21. How to find Records to Update and set Their Values : Use the Purchase Order record that triggered the flow.
22. Set Filter Conditions : None -Always Update Record
23. Set Field values for the Trip Record as

Field : Actual_Delivery_Date__c

Value : {!ActualDeliveryDate}

24. Click Done
25. Save the flow as “Actual Delivery Date Updating”.
26. Activate the flow.

Milestone 14
Create a Trigger

Activity 1:Create a trigger to calculate Total Amount On Order Item

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.

Step 4 :

Create an Apex Trigger:

```
trigger CalculateTotalAmountTrigger on Order_Item__c (after insert, after
update, after delete, after undelete) {
   // Call the handler class to handle the logic
   CalculateTotalAmountHandler.calculateTotal(Trigger.new, Trigger.old,
Trigger.isInsert, Trigger.isUpdate, Trigger.isDelete, Trigger.isUndelete);
}
```

Step 4 :

i) In the Developer Console window, go to the top menu and click on "File".
ii) Select New: From the dropdown menu under "File", select "New".
iii) Choose Apex Class: Name it as CalculateTotalAmountHandler .

```
public class CalculateTotalAmountHandler {
 // Method to calculate the total amount for Purchase Orders based on
related Order Items
   public static void calculateTotal(List<Order_Item__c> newItems,
List<Order_Item__c> oldItems, Boolean isInsert, Boolean isUpdate, Boolean
isDelete, Boolean isUndelete) {
      // Collect Purchase Order IDs affected by changes in Order_Item__c
records
       Set<Id> parentIds = new Set<Id>();
       // For insert, update, and undelete scenarios
       if (isInsert || isUpdate || isUndelete) {
           for (Order_Item__c ordItem : newItems) {
               parentIds.add(ordItem.Purchase_Order_Id__c);
           }
       }
               // For update and delete scenarios
       if (isUpdate || isDelete) {
           for (Order_Item__c ordItem : oldItems) {
               parentIds.add(ordItem.Purchase_Order_Id__c);
           }
```

```
    }
    // Calculate the total amounts for affected Purchase Orders
    Map<Id, Decimal> purchaseToUpdateMap = new Map<Id,
Decimal>();
    if (!parentIds.isEmpty()) {
        // Perform an aggregate query to sum the Amount__c for each
Purchase Order
        List<AggregateResult> aggrList = [
            SELECT Purchase_Order_Id__c, SUM(Amount__c) totalAmount
            FROM Order_Item__c
            WHERE Purchase_Order_Id__c IN :parentIds
            GROUP BY Purchase_Order_Id__c
        ];
                // Map the result to Purchase Order IDs
        for (AggregateResult aggr : aggrList) {
            Id purchaseOrderId = (Id)aggr.get('Purchase_Order_Id__c');
            Decimal totalAmount = (Decimal)aggr.get('totalAmount');
            purchaseToUpdateMap.put(purchaseOrderId, totalAmount);
        }
        // Prepare Purchase Order records for update
        List<Purchase_Order__c> purchaseToUpdate = new
List<Purchase_Order__c>();
        for (Id purchaseOrderId : purchaseToUpdateMap.keySet()) {
            Purchase_Order__c purchaseOrder = new Purchase_Order__c(Id =
purchaseOrderId, Total_Order_cost__c =
purchaseToUpdateMap.get(purchaseOrderId));
            purchaseToUpdate.add(purchaseOrder);
        }
        // Update Purchase Orders if there are any changes
```

```
            if (!purchaseToUpdate.isEmpty()) {
                update purchaseToUpdate;
            }
        }
    }
}
```

Save it .

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Milestone 15
Reports

Activity 1: Create a Purchase Order Based On Supplier(Summary)Report

1. Click App Launcher
2. Select Medical Inventory Management App
3. Click on Report tab
4. Click on New Report.
5. Click the report type as Purchase Order 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 ”)

View 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 Report Tab
4. Click on Purchase Orders based on Suppliers and see records.

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Activity 2 : Create a Complete Purchase Details Report

1. Click App Launcher
2. Select Medical Inventory Management App
3.Click on Reports tab
4.Click on New Report.
5.Click the report type as Purchase Orders with Order Items and Product ID >>click Start report.
6.Click on Filters and select as follows and click on Apply.

7.Customize your report , in group rows select - Supplier ID , Actual Delivery Date , Purchase Order : Purchase Order ID , for columns Product ID : Product ID , Product ID : Product name, Order Count , Quantity Received , Amount (In this way we are making a Summary Report).
8. Click save and run
9.Give report name -Complete Purchase Details Report
10.Click Save

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Milestone 16

Dash boards

Activity 1 : Create Dashboard

1. Click on the Dashboards tab from the Medical Inventory Management Appilication.
2. Click on the new dashboard.
3. Give name - Medical Inventory Dash board
4. Click create
5. Click on +widget

6. Select the Purchase Orders based on Suppliers Report

7. For the data visualization select any of the charts , tables etc. As per your choice / requirement
8. Click add
9. Click save

Add Widget
Report
Purchase Orders based on Supplie
Use chart settings from report
Display As
123
Value
Sum of Total Order Cost
Sliced By
Supplier ID
Preview
Purchase Orders based on Suppliers
Sum of Total Order Cost
Supplier ID
Supplier-001
Supplier-002
₹4.5K
₹26K
₹22K
View Report (Purchase Orders based on Suppliers)
Cancel
Add

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
₹26K
₹22K
View Report (Purchase Orders based on Suppliers)
Cancel
Add

Activity 2 : View Dashboard

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 Dash Board see graph view of records

MEDICAL INVENTORY MANAGEMENT

Github Link
https://github.com/renukaduvvuru2/medical-inventory-management---LTVIP2025TMID29579

Demo Video Link
https://drive.google.com/file/d/1519IOH-DAgihY0y0o8njjHP6dUuhcAa9/view?usp=drive_link