

MEDICAL INVENTORY MANAGEMENT

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College Code: bru36

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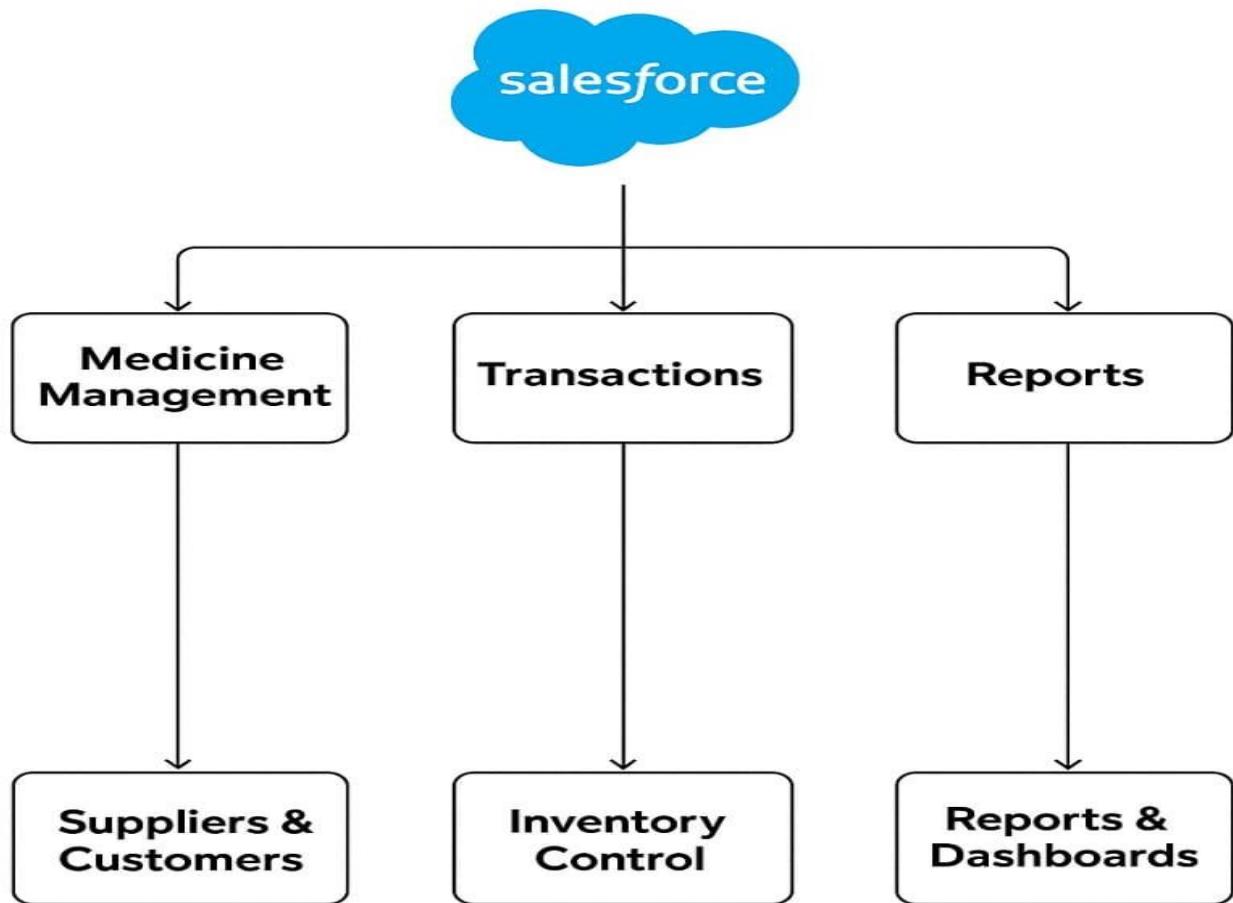
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1. INTRODUCTION

1.1. Project Overview

The Medical Inventory Management System is a Salesforce-based application designed to manage and streamline the flow of medicines, equipment, and supplies in hospitals, pharmacies, and clinics. The project leverages Salesforce CRM features like custom objects, relationships, reports, dashboards, and automation tools to ensure accurate tracking, reduce stockouts, and improve overall efficiency in managing medical inventory.

Medical Inventory Management



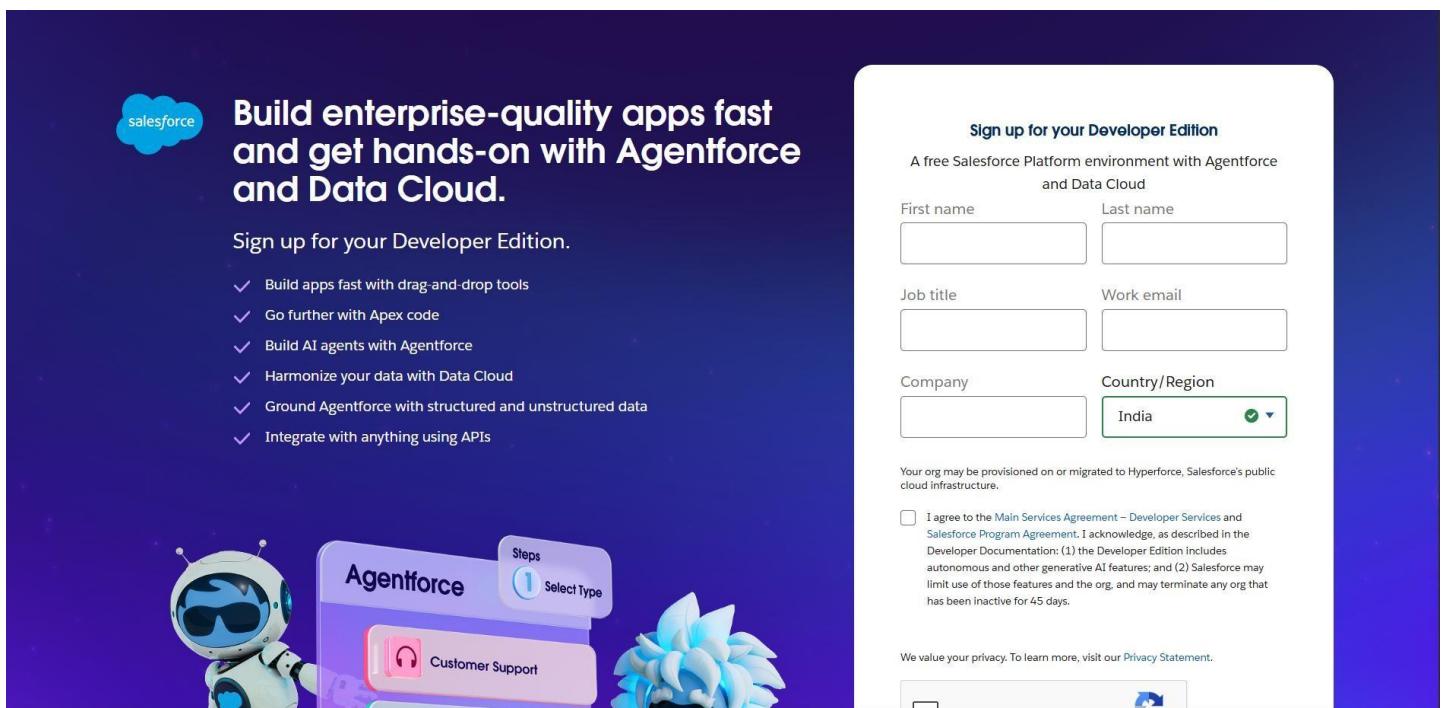
1.2 Purpose

The purpose of this project is to design and implement a Salesforce-based Medical Inventory Management System that ensures efficient tracking, management, and monitoring of medicines, medical supplies, and related transactions within healthcare organizations such as hospitals, pharmacies, and clinics.

2. Development Phase

Creating a developer account : We can create an developers account in salesforce by using the following url

URL:- <https://www.salesforce.com/form/developer-signup/?d=pb>



Creating objects:- We created object named Products , Purchase Order, Order Item, Inventory Transaction and Supplier.

Setup Home Object Manager

SETUP > OBJECT MANAGER
Product

Details

Description

API Name
Product_c

Custom
✓
Singular Label
Product
Plural Label
Products

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

Details

Enable Reports
✓

Track Activities

Track Field History

Deployment Status
Deployed

Help Settings
Standard salesforce.com Help Window

Edit Delete

Setup Home Object Manager

SETUP > OBJECT MANAGER
Purchase Order

Details

Description

API Name
Purchase_Order_c

Custom
✓
Singular Label
Purchase Order
Plural Label
Purchase Orders

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

Details

Enable Reports
✓

Track Activities
✓

Track Field History

Deployment Status
Deployed

Help Settings
Standard salesforce.com Help Window

Edit Delete

Setup Home Object Manager

SETUP > OBJECT MANAGER
Order Item

Details

Description

API Name
Order_Item__c

Custom

Singular Label
Order Item

Plural Label
Order Items

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

Details

Enable Reports
✓

Track Activities
✓

Track Field History
✓

Deployment Status
Deployed

Help Settings
Standard salesforce.com Help Window

Edit Delete

Setup Home Object Manager

SETUP > OBJECT MANAGER
Inventory Transaction

Details

Description

API Name
Inventory_Transaction__c

Custom

Singular Label
Inventory Transaction

Plural Label
Inventory Transactions

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

Details

Enable Reports
✓

Track Activities
✓

Track Field History
✓

Deployment Status
Deployed

Help Settings
Standard salesforce.com Help Window

Edit Delete

SETUP > OBJECT MANAGER

Supplier

Details

Description

API Name
Supplier__c

Custom
✓
Singular Label
Supplier

Plural Label
Suppliers

Enable Reports
✓
Track Activities
✓
Track Field History
✓
Deployment Status
Deployed
Help Settings
Standard salesforce.com Help Window

Creating Tabs :- We have created the tabs for the custom made objects Products , Purchase Order, Order Item, Inventory Transaction and Supplier.

Student - Student | Lightning Experience | Salesforce | Tabs | Salesforce

SETUP Home Object Manager

tab

Feature Settings

- Analytics
- Tableau
 - Tableau Embedding
 - Tableau UAF Claims Definition

User Interface

- Console Settings
 - Loaded Console Tab Limit
 - Rename Tabs and Labels
- Tabs

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

Custom Tabs

You can create new custom tabs to extend Salesforce functionality or to build new application functionality.

Custom Object tabs look and behave like the standard tabs provided with Salesforce. Web tabs allow you to embed external web applications and content within the Salesforce window. Visualforce tabs allow you to embed Visualforce pages. Lightning Component tabs allow you to add Lightning components to the navigation menu in Lightning Experience and the mobile app. Lightning Page tabs allow you to add Lightning Pages to Lightning Experience and the mobile app.

Custom Object Tabs

Action	Label	Tab Style	Description
Edit Del	Inventory_Transactions	Bell	
Edit Del	Order_Items	Lightning	
Edit Del	Products	Bell	
Edit Del	Purchase_Orders	Apple	
Edit Del	Suppliers	Desk	

Web Tabs

New | What Is This?

No Web Tabs have been defined

Visualforce Tabs

New | What Is This?

No Visualforce Tabs have been defined

Creating the Lightning app :- We created an lightning app named Medical Inventory Management with items Products, Purchase Orders, Order Items, Inventory Transactions, Suppliers, Reports, and Dashboards and Profiles with System Administrator.

App Details & Branding

App Details

- App Name: Medical Inventory Management
- Developer Name: Medical_Inventory_Management
- Description: Enter a description...

App Branding

- Image: A logo featuring a green cross and leaves.
- Primary Color Hex Value: #0070D2

Org Theme Options

App Launcher Preview

Activate Windows
Go to Settings to activate Windows.

Navigation Items

Choose the items to include in the app, and arrange the order in which they appear. Users can personalize the navigation to add or move items, but users can't remove or rename the items that you add. Some navigation items are available only for phone or only for desktop. These items are dropped from the navigation bar when the app is viewed in a format that the item doesn't support.

Available Items

- Accounts
- Activation Targets
- Activations
- All Sites
- Alternative Payment Methods
- Analytics
- App Launcher
- Appointment Categories
- Appointment Invitations
- Approval Requests
- Approval Submission Details
- Approval Submissions

Selected Items

- Home
- Products
- Purchase Orders
- Order Items
- Inventory Transactions
- Suppliers
- Reports
- Dashboards

Activate Windows
Go to Settings to activate Windows.

The screenshot shows the 'User Profiles' section of the Lightning App Builder. On the left, a sidebar lists 'App Settings' sections: App Details & Branding, App Options, Utility Items (Desktop Only), Navigation Items, and User Profiles (which is currently selected). The main area is titled 'User Profiles' with the sub-instruction 'Choose the user profiles that can access this app.' Below this is a 'Available Profiles' list containing various user profile names, each with a small preview icon. To the right is a 'Selected Profiles' list where profiles can be moved from the available list. At the bottom right of the main area, there's an 'Activate Windows' message with a link to settings.

Configuring Fields and Relationship :- We created various fields and relationship for each custom objects.

The screenshot shows the 'Object Manager' section of the Salesforce setup. The left sidebar lists various setup categories like Page Layouts, Lightning Record Pages, Buttons, etc. The main area is titled 'Product' under 'FIELDS & RELATIONSHIPS'. It displays a table of fields with columns for Field Label, Field Name, Data Type, Controlling Field, and Indexed status. The table includes fields such as Created By, Current Stock Level, Last Modified By, Minimum Stock Level, Owner, Product Description, Product ID, Product Name, and Unit Price. The 'Indexed' column contains checkmarks for several fields.

Purchase Order | Salesforce

orgfarm-f851a23daa-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgK000001vG9/FieldsAndRelationships/view

Guest (2)

Cloud icon

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER

Purchase Order

Details

Fields & Relationships

10 Items, Sorted by Field Label

Actual Delivery Date	Actual_Delivery_Date__c	Date	
Created By	CreatedBy	Lookup(User)	
Expected Delivery Date	Expected_Delivery_Date__c	Date	
Last Modified By	LastModifiedBy	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	Total_Order_Cost__c	Currency(16, 2)	

28°C Heavy rain

Search web & PC

Windows taskbar icons

ENG IN 10-09-2025

Inventory Transaction | Salesforce

orgfarm-f851a23daa-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgK000001vJN/FieldsAndRelationships/view

Guest (2)

Cloud icon

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER

Inventory Transaction

Details

Fields & Relationships

8 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedBy	Lookup(User)		
Last Modified By	LastModifiedBy	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)	✓	
Purchase Order ID	Purchase_Order_ID__c	Lookup(Purchase Order)		✓
Total Order Cost	Total_Order_Cost__c	Formula (Currency)		
Transaction Date	Transaction_Date__c	Date		
Transaction ID	Name	Text(80)	✓	
Transaction Type	Transaction_Type__c	Picklist		

28°C Heavy rain

Search web & PC

Windows taskbar icons

ENG IN 10-09-2025

Supplier | Salesforce

orgfarm-f851a23daa-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01lgK000001vKz/FieldsAndRelationships/view

Guest (2)

Setup Home Object Manager

SETUP > OBJECT MANAGER
Supplier

Fields & Relationships
9 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Address	Address_c	Text(100)		
Contact Person	Contact_Person_c	Text(50)		
Created By	CreatedBy	Lookup(User)		
Email	Email_c	Email		
Last Modified By	LastModifiedBy	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Phone Number	Phone_Number_c	Phone		
Supplier ID	Name	Text(80)		✓
Supplier Name	Supplier_Name_c	Text(50)		

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

28°C Heavy rain Search web & PC ENG IN 20:05 10-09-2025

Order Item | Salesforce

orgfarm-f851a23daa-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01lgK000001vlHl/FieldsAndRelationships/view

Guest (2)

Setup Home Object Manager

SETUP > OBJECT MANAGER
Order Item

Fields & Relationships
9 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Amount	Amount_c	Formula (Currency)		
Created By	CreatedBy	Lookup(User)		
Last Modified By	LastModifiedBy	Lookup(User)		
Order Item ID	Name	Text(80)		✓
Product ID	Product_ID_c	Lookup(Product)		✓
Purchase Order ID	Purchase_Order_ID_c	Master-Detail(Purchase Order)		✓
Quantity Ordered	Quantity_Ordered_c	Number(18, 0)		
Quantity Received	Quantity_Received_c	Number(10, 0)		
Unit Price	Unit_Price_c	Formula (Currency)		

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

28°C Heavy rain Search web & PC ENG IN 20:04 10-09-2025

Setup of the Page Layout:- We edited the Page Layout for the custom objects.

The screenshot shows the Salesforce Setup interface for the 'Product' object. The left sidebar lists various configuration options under 'Page Layouts'. The main area displays the 'Fields' section of the page layout editor. A 'Quick Find' bar is at the top, followed by a table showing fields like 'Section', 'Blank Space', 'Last Modified By', 'Minimum Stock Level', 'Product ID', 'Owner', and 'Unit Price'. Below this are sections for 'Information', 'System Information', and 'Custom Links'. A 'Mobile Cards (Salesforce mobile only)' section is also present. The bottom of the screen shows the Windows taskbar with various application icons.

The screenshot shows the Salesforce Setup interface for the 'Purchase Order' object. The left sidebar lists configuration options. The main area displays the 'Fields' section of the page layout editor. A 'Quick Find' bar is at the top, followed by a table showing fields like 'Section', 'Blank Space', 'Last Modified By', 'Expected Delivery Date', 'Owner', 'Purchase Order ID', 'Actual Delivery Date', 'Order Count', 'Supplier ID', 'Created By', 'Order Date', and 'Total Order Cost'. Below this are sections for 'Purchase Order Detail', 'Information', 'System Information', and 'Custom Links'. A 'Mobile Cards (Salesforce mobile only)' section is also present. The bottom of the screen shows the Windows taskbar with various application icons.

Inventory Transaction | Salesforce

orgfarm-f851a23daa-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgK000001vJN/PageLayouts/00hgK000006djWTQAY/view

Guest (2)

Cloud icon

Search Setup

Setup Home Object 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

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

Fields

	Quick Find	Field Name
Section	Owner	Transaction ID
Blank Space	Purchase Order ID	
Created By	Total Order Cost	
Last Modified By	Transaction Date	

Information (Header visible on edit only)

* Transaction ID: Sample Text
Purchase Order ID: Sample Text
Transaction Type: Sample Text
Transaction Date: 9/10/2025
Total Order Cost: \$123.45

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) !

Drag expanded lookups and mobile-enabled Visualforce pages here to display them as mobile cards.

Related Lists

28°C Heavy rain

Search web & PC

20:12 10-09-2025

Supplier | Salesforce

orgfarm-f851a23daa-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgK000001vlKz/PageLayouts/00hgK000006djhQAl/view

Guest (2)

Cloud icon

Search Setup

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 Search Layouts List View Button Layout Restriction Rules Scoping Rules

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

Fields

	Quick Find	Field Name
Section	Created By	Phone Number
Blank Space	Email	Supplier ID
Address	Last Modified By	Supplier Name
Contact Person	Owner	

Information (Header visible on edit only)

* Supplier ID: Sample Text
Supplier Name: Sample Text
Contact Person: Sample Text

* Phone Number: 1-415-555-1212
Email: sarah.sample@company.com
Address: Sample Text
Owner: Sample Text

System Information (Header visible on edit only)

Created By: Sample Text
Last Modified By: Sample Text

Custom Links (Header visible on edit only)

Mobile Cards (Salesforce mobile only) !

Drag expanded lookups and mobile-enabled Visualforce pages here to display them as mobile cards.

Related Lists

28°C Heavy rain

Search web & PC

20:13 10-09-2025

Order Item | Salesforce

orgfarm-f851a23daa-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01gK000001vH/PageLayouts/00hgK000006dJUrQAI/view

Guest (2)

Compact Layout:-We created Compact Layout for the Custom object Product and Purchase Order.

Product Compact Layout

Product Compact Layout

< Back to Product

Help for this Page

Label	API Name	Included Fields	Created By
Product Compact Layout	Product_Compact_Layout	Product Name, Unit Price, Current Stock Level	saithi_b, 9/16/2025, 12:18 AM

Setup Home Object Manager

SETUP > OBJECT MANAGER Purchase Order

Purchase Order Compact Layout

Compact Layout Detail

Label	Purchase Order Compact Layout
API Name	Purchase_Order_Compact_Layout
Included Fields	Purchase Order ID Order Date Total Order Cost

Created By saith.k. 9/16/2025, 12:19 AM

Modified By saith.k. 9/17/2025, 8:43 AM

Help for this Page

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
Object Access
Triggers
Flow Triggers
Validation Rules
Conditional Field Formatting

Validation Rule:- We created an validation rule under Purchase order for expected delivery date.

SETUP > OBJECT MANAGER Purchase Order

Purchase Order Validation Rule

Validation Rule Detail

Rule Name	Expected_Delivery_Date_Validation
Error Condition Formula	Expected_Delivery_Date__c - Order_Date__c > 7
Error Message	The Expected Delivery Date should not exceed 7 days
Description	

Active ✓

Error Location Top of Page

Created By saith.k. 9/17/2025, 7:52 AM

Modified By saith.k. 9/17/2025, 7:52 AM

Help for this Page

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
Object Access
Triggers
Flow Triggers
Validation Rules
Conditional Field Formatting

Profiles:- We created Profiles named Inventory Manager and Purchase Manager.

The screenshot shows the Salesforce Setup interface with the 'Profiles' tab selected. A search bar at the top right contains the text 'Search Setup'. Below it, a sidebar on the left lists 'Users' and 'Profiles', with 'Profiles' being the active tab. A search bar in the sidebar also contains the text 'prof'. The main content area displays the 'Inventory Manager' profile details. At the top, there's a 'Profile Detail' section with fields for Name (Inventory Manager), User License (Salesforce), Description, Created By (sally.k), and Modified By (sally.k). Below this is a 'Page Layouts' section showing assignments for various object types like Global, Email Application, Home Page Layout, Account, and Alternative Payment Method. The right side of the page shows location group assignments for various milestones and operating hours.

The screenshot shows the Salesforce Setup interface with the 'Profiles' tab selected. A search bar at the top right contains the text 'Search Setup'. Below it, a sidebar on the left lists 'Users' and 'Profiles', with 'Profiles' being the active tab. A search bar in the sidebar also contains the text 'prof'. The main content area displays the 'Purchase Manager' profile details. At the top, there's a 'Profile Detail' section with fields for Name (Purchase Manager), User License (Salesforce), Description, Created By (sally.k), and Modified By (sally.k). Below this is a 'Page Layouts' section showing assignments for various object types like Global, Email Application, Home Page Layout, Account, and Alternative Payment Method. The right side of the page shows location group assignments for various milestones and operating hours.

Roles:- We created an Roles of Inventory Management and Purchasing Management.

Setup Home Object Manager

roles

Users

Roles

Sree Narayana Guru College

- Add Role
- CEO** Edit | Del | Assign
- Add Role
- CFO** Edit | Del | Assign
- Add Role
- COO** Edit | Del | Assign
- Add Role
- SVP.Customer Service & Support** Edit | Del | Assign
- Add Role
- Customer Support, International** Edit | Del | Assign
- Add Role
- Customer Support, North America** Edit | Del | Assign
- Add Role
- Installation & Repair Services** Edit | Del | Assign
- Add Role
- SVP.Human Resources** Edit | Del | Assign
- Add Role
- SVP.Sales & Marketing** Edit | Del | Assign
- Add Role
- Inventory Manager** Edit | Del | Assign
- Add Role
- Purchasing Manager** Edit | Del | Assign
- Add Role
- VP.International Sales** Edit | Del | Assign
- Add Role
- VP.Marketing** Edit | Del | Assign

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

Setup Home Object Manager

prof

Profiles

Profile Inventory Manager

Help for this Page

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.
If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

Login IP Ranges | Enabled Apex Class Access | Enabled Visualforce Page Access | Enabled External Data Source Access | Enabled Named Credential Access | Enabled External Credential Principal Access | Enabled Custom Metadata Type Access | Enabled Custom Setting Definitions Access | Enabled Flow Access | Enabled Service Presence Status Access | Enabled Custom Permissions

Profile Detail

Name	Inventory Manager	Custom Profile
User License	Salesforce	✓
Description		
Created By	sallyk	9/10/2025, 2:07 AM
Modified By	sallyk	9/17/2025, 10:06 AM

Page Layouts

Standard Object Layouts	Global	Location Group Assignment	Location Group Assignment Layout
Email Application	Not Assigned	Macro	[View Assignment]
Home Page Layout	Home Page Default	Object Milestone	[View Assignment]
Account	Account Layout	Operating Hours	[View Assignment]
Alternative Payment Method	Alternative Payment Method Layout	Opportunity	[View Assignment]

Setup Home Object Manager

role

Users

Roles

Purchasing Manager

Help for this Page

Below is the list of users assigned to this role. Click Edit to modify the role name. Click Assign Users to Role to assign existing users to this role. Click New User to create a user for this role.

Hierarchy: SNGC > CEO > SVP.Sales & Marketing > Purchasing Manager
Siblings: VP.North American Sales, VP.Marketing, VP.International Sales, Inventory Manager

Role Detail

Label	Purchasing Manager	Role Name	Purchasing_Manager
This role reports to	SVP.Sales & Marketing	Role Name as displayed on reports	
Modified By	sallyk, 9/10/2025, 2:29 AM	Sharing Groups	Role, Role and Internal Subordinates
Opportunity Access	Users in this role can edit all opportunities associated with accounts that they own, regardless of who owns the opportunities		
Case Access	Users in this role can edit all cases associated with accounts that they own, regardless of who owns the cases		

Users in Purchasing Manager Role

Action	Full Name	Alias	Username	Active
Edit	John PurchaseM	jpurc	johns@purchase.com	✓

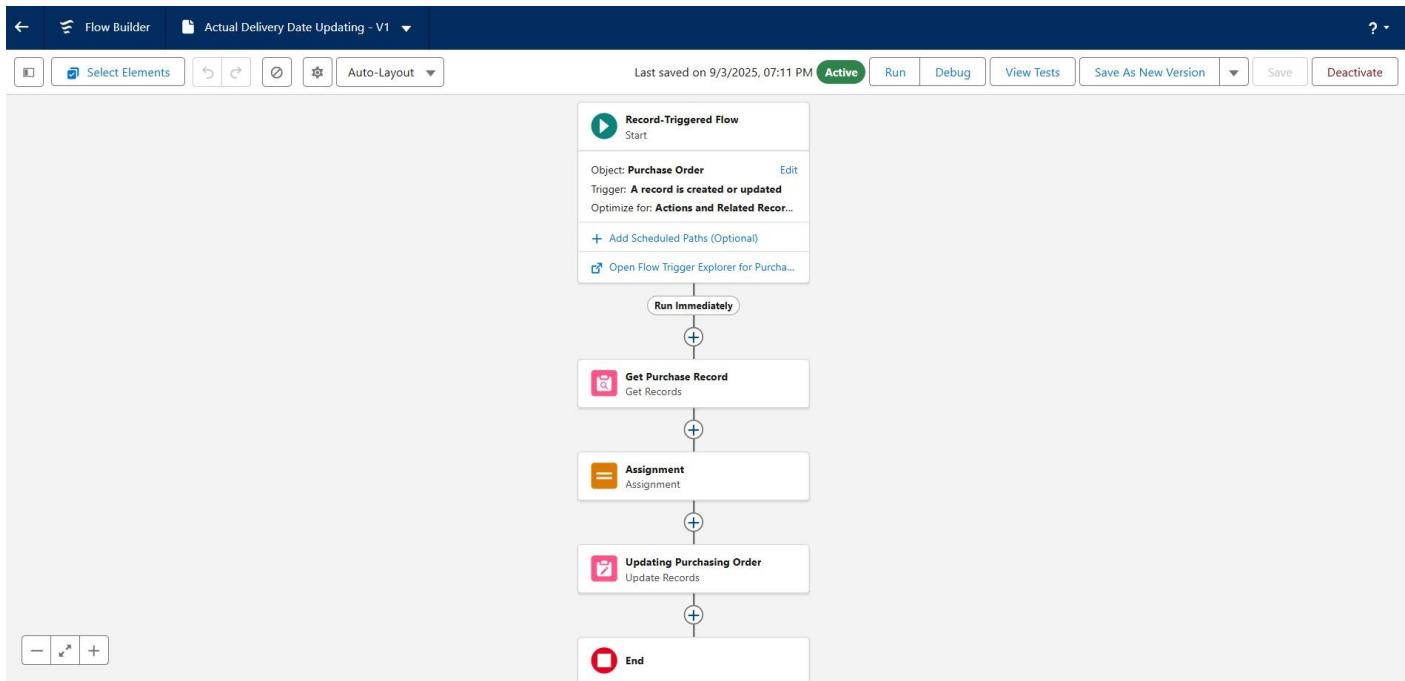
Users in Purchasing Manager Role Help

Permission Sets:- We created Permission set for the Medical Inventory

The screenshot shows the Salesforce Setup interface with the following details:

- Setup** tab selected.
- Object Manager** dropdown.
- Search Bar**: Search term "permis".
- Left Sidebar**:
 - Users**:
 - Permission Set Groups**
 - Permission Sets** (selected)
 - Custom Code**
 - Custom Permissions**
 - Message: Didn't find what you're looking for? Try using Global Search.
- Permission Sets Page Header**:
 - SEARCH** button.
 - Clone**, **Edit Properties**, **Manage Assignments**, **View Summary** buttons.
 - Video Tutorial** and **Help for this Page**.
- Permission Set Overview**:
 - Description**: Purchase Manager Create Access.
 - License**: None.
 - Session Activation Required**:
 - Permission Set Groups Added To**: 0.
 - API Name**: Purchase_Manager_Create_Access.
 - Namespace Prefix**: salesh_k.
 - Created By**: saith_k. on 9/15/2025, 12:33 AM.
 - Last Modified By**: saith_k. on 9/15/2025, 12:36 AM.
- Apps Section**:
 - Assigned Apps**: Settings that specify which apps are visible in the app menu.
 - Assigned Connected Apps**: Settings that specify which connected apps are visible in the app menu.
 - Object Settings**: Permissions to access objects and fields, and settings such as tab availability.
 - App Permissions**: Permissions to perform app-specific actions, such as "Manage Call Centers".
 - Apex Class Access**: Permissions to execute Apex classes.
 - Visualforce Page Access**: Permissions to execute Visualforce pages.
 - External Data Source Access**: Permissions to authenticate against external data sources.
 - Flow Access**: Permissions to execute Flows.
 - Named Credential Access**: Permissions to authenticate against named credentials.
 - External Credential Principal Access**: Permissions to authenticate with external credential principal mappings.

Flows:-We created flow named Actual Delivery Date Update to update the actual delivery date.



Apex Triggers:- We created the trigger to calculate the Total amount on Order item.

Name	Code Coverage	Created By	sObject Type	Status
CalculateTotalAmountTrigger	0% (0/1)	saith_k, 9/17/2025, 7:56 AM	Order Item	Active

```

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);
}

```

Apex Classes:- We created Apex Handler class.

Screenshot of the Salesforce Apex Classes page showing the code for the CalculateTotalAmountHandler class.

Apex Class Detail

Name: CalculateTotalAmountHandler
Namespace Prefix:
Created By: sajith_k_ | 9/17/2025, 7:58 AM

Status: Active
Code Coverage: 0% (0/22)
Last Modified By: sajith_k_ | 9/17/2025, 8:00 AM

Class Body

```

1 public class CalculateTotalAmountHandler {
2
3
4
5     // Method to calculate the total amount for Purchase Orders based on related Order items
6     public static void calculateTotal(List<Order_Item__c> newItems, List<Order_Item__c> oldItems, Boolean isInsert, Boolean isUpdate, Boolean isDelete, Boolean isUndelete) {
7
8
9
10
11         // Collect Purchase Order IDs affected by changes in Order_Item__c records
12         Set<Id> parentIds = new Set<Id>();
13
14
15
16         // For insert, update, and undelete scenarios
17         if (isInsert || isUpdate || isUndelete) {
18
19             for (Order_Item__c ordItem : newItems) {
20                 parentIds.add(ordItem.Purchase_Order__c);
21
22             }
23
24         }
25
26     }
27
28 }
```

Activate Windows
Go to Settings to activate Windows.

Reports:- Creating Reports named Purchase Orders Click Start report and Complete Purchase Details Report.

Screenshot of the Salesforce Reports page showing the Complete Purchase Details Report.

Report: Purchase Orders with Order Items and Product ID
Complete Purchase Details Report

Total Records: 3 Total Order Count: 3 Total Quantity Received: 930 Total Amount: \$5,540.00

Supplier ID: SP002 (Sum of Order Count: 2)

Supplier ID: SP001 (Sum of Order Count: 1)

Supplier ID	Actual Delivery Date	Purchase Order: Purchase Order ID	Product ID: Product ID	Order Count	Product ID: Product Name	Quantity Received	Amount
SP002 (2)	9/20/2025 (1)	PO003 (1)	MED004	1	Latex Gloves (Box of 100)	250	\$1,745.00
				Subtotal		250	\$1,745.00
						250	\$1,745.00

Activate Windows
Go to Settings to activate Windows.

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

Purchase Orders based on Suppliers

Total Records	Total Order Count	Total Total Order Cost
3	3	\$5,540.00

Supplier ID: SP001, SP002

Sum of Order Count: 1, 2

Purchase Order: Purchase Order ID: PO001, PO003, PO002

Supplier ID	Purchase Order: Purchase Order ID	Order Count	Total Order Cost
SP001 (1)	PO001 (1)	1	\$630.00
SP002 (2)	PO002 (1)	1	\$3,165.00
	PO003 (1)	1	\$1,745.00

Activate Windows Go to Settings to activate Windows.

Dashboards:- We created the Dashboard for the Medical Inventory Management.

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

Medical Inventory DashBoard

As of Sep 19, 2025, 10:19 AM Viewing as sajith k

Purchase Orders based on Suppliers

Sum of Order Count: 3

Supplier ID: SP001, SP002

Purchase Orders based on Suppliers

Sum of Order Count: 1, 1, 1

Supplier ID: SP001, SP002, SP003

Activate Windows Go to Settings to activate Windows.

3.FUNCTIONAL AND PERFORMANCE TESTING

Performance Testing

Testing the Triggers to get the total amount in the Order Item

Order Item ID: POI002
Purchase Order ID: PO002
Amount: \$3,165.00

Product Details:

- Product ID: MED003
- Unit Price: \$6.33
- Created By: sajith.k., 9/19/2025, 8:46 AM
- Quantity Ordered: 500
- Quantity Received: 500
- Last Modified By: sajith.k., 9/19/2025, 8:46 AM

Activate Windows
Go to Settings to activate Windows.

Validation Rule checking

New Purchase Order

Information

- Purchase Order ID: PO005
- Supplier ID: SP001
- Order Date: 9/19/2025
- Actual Delivery Date: 9/30/2025
- Total Order Cost: \$185.00
- Expected Delivery Date: 9/29/2025

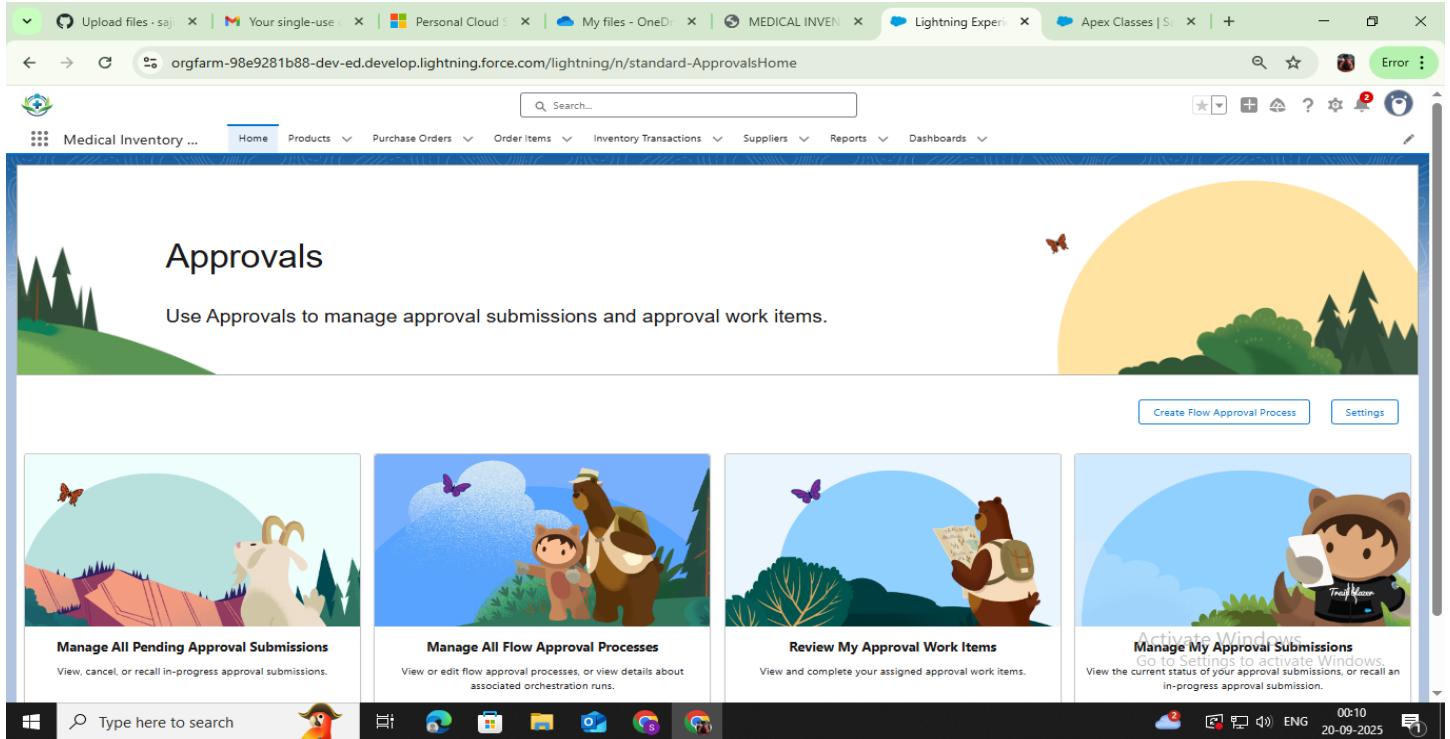
We hit a snag.
Review the errors on this page.
• The Expected Delivery Date should not exceed 7 days

Cancel Save & New Save

Activate Windows
Go to Settings to activate Windows.

RESULTS :-

Home page



Approvals

Use Approvals to manage approval submissions and approval work items.

Create Flow Approval Process Settings

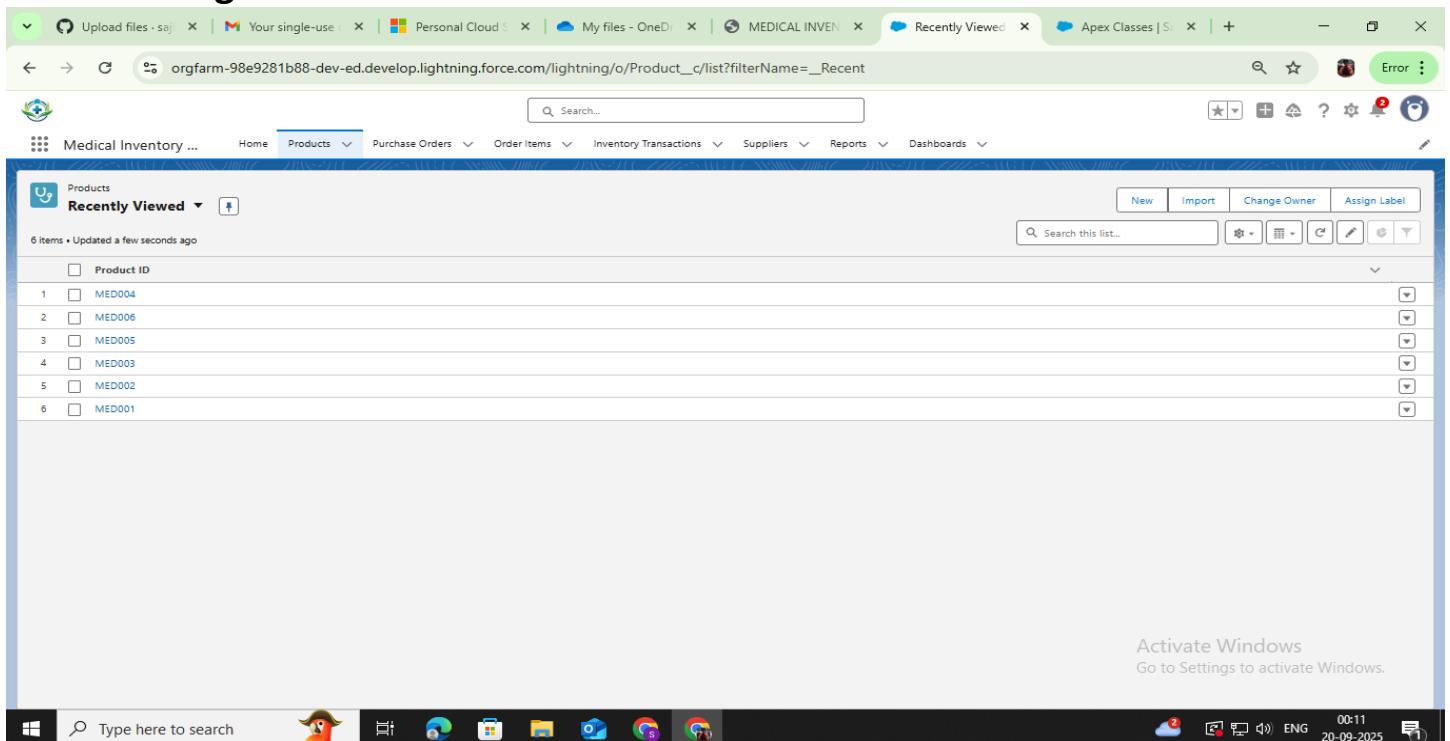
Manage All Pending Approval Submissions View, cancel, or recall in-progress approval submissions.

Manage All Flow Approval Processes View or edit flow approval processes, or view details about associated orchestration runs.

Review My Approval Work Items View and complete your assigned approval work items.

Activate Windows Go to Settings to activate Windows. View the current status of your approval submissions, or recall an in-progress approval submission.

Products Page



Products Recently Viewed

6 items • Updated a few seconds ago

Product ID
1 MED004
2 MED006
3 MED005
4 MED003
5 MED002
6 MED001

New Import Change Owner Assign Label

Search this list...

Activate Windows Go to Settings to activate Windows.

Purchase Orders

The screenshot shows the 'Purchase Orders' page from a Salesforce Lightning environment. The top navigation bar includes links for 'Upload files - saj', 'Your single-use', 'Personal Cloud', 'My files - OneDrive', 'MEDICAL INVEN', 'Recently Viewed', and 'Apex Classes | S'. The main menu has sections for 'Medical Inventory ...', 'Home', 'Products', 'Purchase Orders' (selected), 'Order Items', 'Inventory Transactions', 'Suppliers', 'Reports', and 'Dashboards'. A search bar at the top right contains the placeholder 'Search...'. Below the menu, a sidebar lists 'Purchase Orders' and 'Recently Viewed' (with a dropdown arrow). The main content area displays a table with three items:

	Purchase Order ID
1	PO002
2	PO003
3	PO001

At the bottom right of the page, there is a message: 'Activate Windows Go to Settings to activate Windows.' The bottom of the screen shows a Windows taskbar with icons for File Explorer, Edge, and other applications, along with system status indicators like battery level and network connection.

Order items

The screenshot shows the 'Order Items' page from a Salesforce Lightning environment. The top navigation bar and main menu are identical to the 'Purchase Orders' page. The main content area displays a table with three items:

	Order Item ID
1	POI002
2	POI003
3	POI001

At the bottom right of the page, there is a message: 'Activate Windows Go to Settings to activate Windows.' The bottom of the screen shows a Windows taskbar with icons for File Explorer, Edge, and other applications, along with system status indicators like battery level and network connection.

Inventory Transactions

The screenshot shows the Salesforce Lightning interface for the 'Medical Inventory' application. The top navigation bar includes links for Home, Products, Purchase Orders, Order Items, Inventory Transactions (selected), Suppliers, Reports, and Dashboards. The main content area displays a list of 'Recently Viewed' inventory transactions. The list includes columns for Transaction ID (T003, T002, T001) and checkboxes. A search bar at the top right allows filtering the list. The bottom right corner of the screen shows a Windows taskbar with the date and time (00:15 20-09-2025).

3 items • Updated a few seconds ago

	Transaction ID
1	T003
2	T002
3	T001

Activate Windows
Go to Settings to activate Windows.

Suppliers

The screenshot shows the Salesforce Lightning interface for the 'Medical Inventory' application. The top navigation bar includes links for Home, Products, Purchase Orders, Order Items, Inventory Transactions, Suppliers (selected), Reports, and Dashboards. The main content area displays a list of 'Recently Viewed' suppliers. The list includes columns for Supplier ID (SP002, SP001) and checkboxes. A search bar at the top right allows filtering the list. The bottom right corner of the screen shows a Windows taskbar with the date and time (00:16 20-09-2025).

2 items • Updated a few seconds ago

	Supplier ID
1	SP002
2	SP001

Activate Windows
Go to Settings to activate Windows.

Reports

The screenshot shows the 'Reports' section of a web application. The top navigation bar includes links for 'Home', 'Products', 'Purchase Orders', 'Order Items', 'Inventory Transactions', 'Suppliers', 'Reports', and 'Dashboards'. A search bar at the top right contains the placeholder 'Search...'. On the left, a sidebar lists categories: 'Reports', 'Recent' (with 2 items), 'RECENT' (listing 'Purchase Orders based on Suppliers' and 'Complete Purchase Details Report'), 'Created by Me', 'Private Reports', 'Public Reports', 'All Reports', 'FOLDERS', 'All Folders', 'Created by Me', 'Shared with Me', and 'FAVORITES', 'All Favorites'. The main content area displays a table with columns: 'Report Name', 'Description', 'Folder', 'Created By', 'Created On', and 'Subscribed'. The first two rows in the table correspond to the reports listed in the sidebar. At the bottom right of the page, there is a message: 'Activate Windows Go to Settings to activate Windows.' The bottom of the screen shows a Windows taskbar with icons for File Explorer, Edge, and other applications.

Dashboards

The screenshot shows the 'Dashboards' section of the web application. The top navigation bar and sidebar are identical to the 'Reports' page. The main content area displays a table with columns: 'Dashboard Name', 'Description', 'Folder', 'Created By', 'Created On', and 'Subscribed'. It contains one item: 'Medical Inventory Dashboard' in the 'Private Dashboards' folder, created by 'sajith k' on 9/17/2025, 10:12 AM. The bottom right of the page has the same activation message: 'Activate Windows Go to Settings to activate Windows.' The bottom of the screen shows a Windows taskbar.

ADVANTAGES AND DISADVANTAGES OF MEDICAL INVENTORY MANAGEMENT:-

ADVANTAGES:-

- 1. Centralized Data** – All medical inventory, supplier, and transaction details are stored in Salesforce, easily accessible from anywhere.
- 2. Real-time Tracking** – Automatic updates to stock after each transaction prevent stockouts and overstocking.
- 3. Expiry & Low Stock Alerts** – Reduces wastage and ensures critical medicines are always available.
- 4. Integration with Accounts** – Suppliers and customers are directly linked, improving accountability.
- 5. Automation** – Formula fields, validation rules, and workflows reduce manual errors.
- 6. Reports & Dashboards** – Provides clear insights into sales, purchases, and inventory status for better decision-making.
- 7. Scalability** – Easily extendable to include new medicines, suppliers, or advanced automation.
- 8. Cloud-based** – No hardware dependency, accessible anytime with Salesforce security features.

DISADVANTAGES:-

- 1. Initial Setup Complexity** – Customizing Salesforce objects, fields, and automation requires technical knowledge
- 2. Dependency on Internet** – As Salesforce is cloud-based, it needs a reliable internet connection.
- 3. Cost Factor** – Salesforce licensing and storage may be expensive for small clinics or pharmacies.

4. Learning Curve – Users need training to effectively use reports, dashboards, and automation.

5. Customization Limits – Some advanced features may require Apex coding or third-party apps.

CONCLUSION

The Salesforce-based Medical Inventory Management System successfully demonstrates how CRM platforms can be customized beyond customer management to serve as a complete healthcare inventory solution. By integrating medicine management, transactions, suppliers, customers, and dashboards, the system ensures accuracy, efficiency, and reliability in handling medical stock. Despite minor challenges such as cost and setup complexity, the system provides long-term benefits including real-time monitoring, reduced wastage, improved supplier relations, and data-driven insights. Overall, this project proves the effectiveness of Salesforce as a scalable platform for building critical inventory solutions in the medical domain.