

MEDICAL INVENTORY MANAGEMENT

College Name: Cheran College for Women

College Code: bru5g1

TEAM ID: NM2025TMID28612

TEAM MEMBERS: 4

Team LeaderName: Selvambika.M.

Email: selvambika1411@gmail.com

Team Member1: Divya. M.

Email: divyasuganthi961@gmail.com

Team Member2: Mohana Priya. S.

Email: deepamohana74@gmail.com

Team Member3: Yuvashree. T.

Email: arunyuva628333@gmail.com

INTRODUCTION

Project Overview:

The Medical Inventory Management CRM is designed to streamline the management of medical supplies in healthcare organizations. It provides a centralized system to track stock levels, purchase orders, suppliers, and inventory transactions. The system addresses critical business needs such as ensuring timely replenishment, avoiding stock-outs, monitoring expiry dates, and improving supplier management. With custom automation, reports, and dashboards, the CRM improves decision-making, compliance, and overall operational efficiency.



Purpose:

The main objective is to manage medical products, suppliers, purchase orders, and stock levels efficiently. I built this project on Salesforce using custom objects, flows, validation rules, Apex, reports, and dashboards.

DEVELOPMENT PHASE

Creating Developer Account:

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

The screenshot shows the "Sign up for your Developer Edition" page on the Salesforce website. The page features a dark blue header with the Salesforce logo and a sub-header: "Build enterprise-quality apps fast and get hands-on with Agentforce and Data Cloud." Below this, there's a section titled "Sign up for your Developer Edition." with a list of benefits:

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

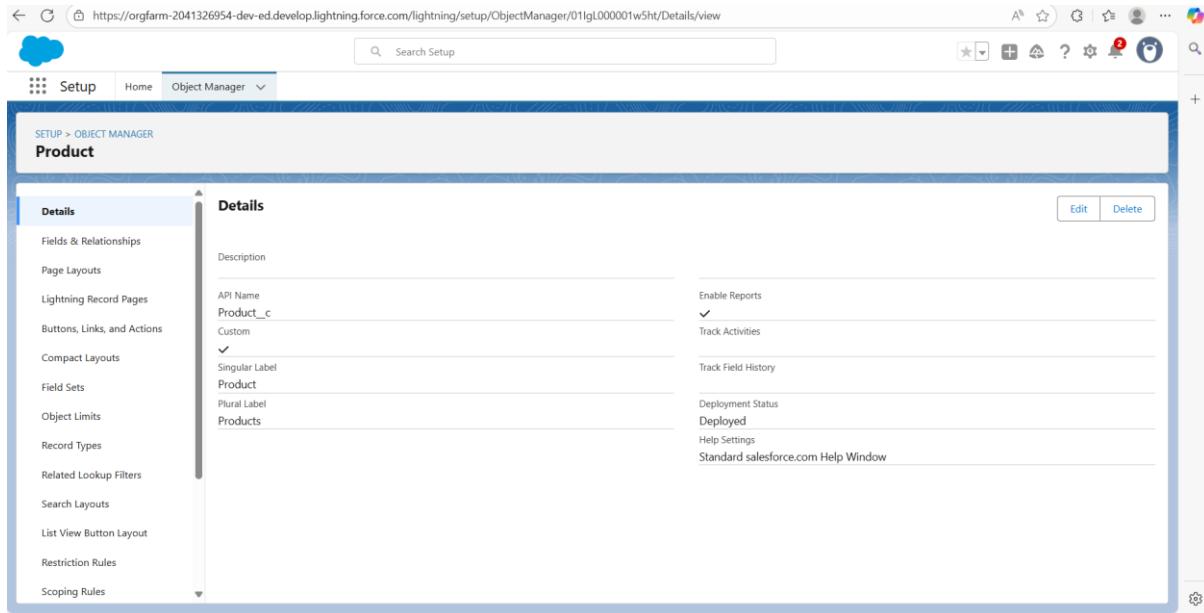
On the right side, there's a form for entering personal information:

First name	Last name
Selvambika	M
Job title	Work email
sales force developer	selvambika1411@gmail.com
Company	Country/Region
smart bridge	India

Below the form, there's a note: "Your org may be provisioned on or migrated to Hyperforce, Salesforce's public cloud infrastructure." A checkbox for agreeing to the "Main Services Agreement – Developer Services and Salesforce Program Agreement" is present, along with a link to the "Privacy Statement".

Created objects:

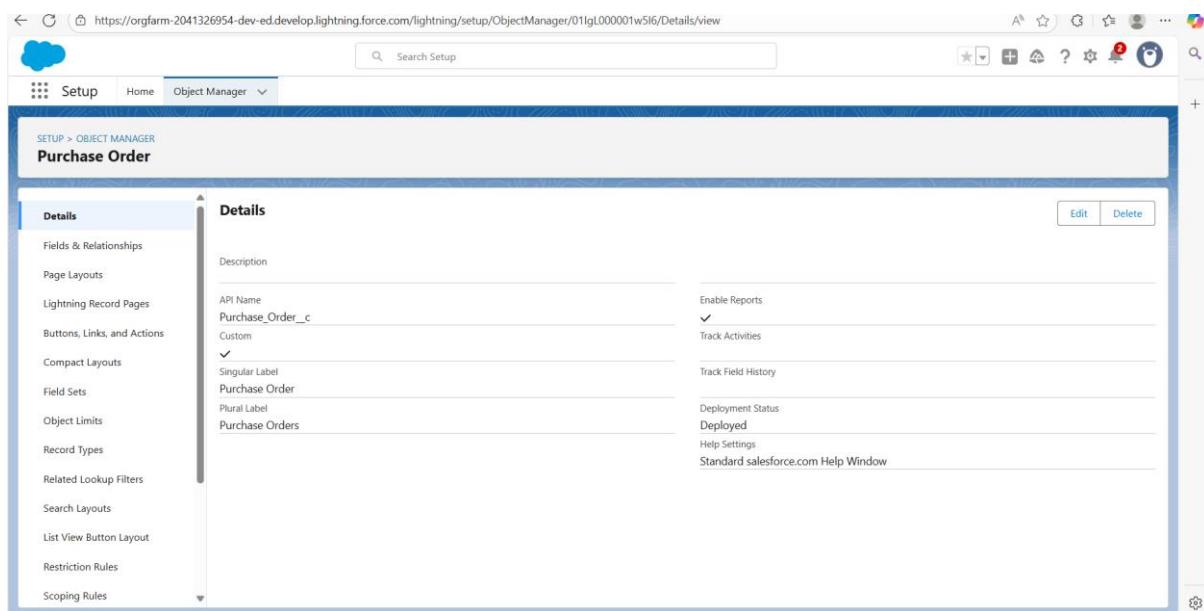
Products, Purchase Orders, Order Items, Inventory Transactions, Suppliers.



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, Restriction Rules, and Scoping Rules. The main 'Details' tab displays the following information:

Field	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

At the bottom right of the main area are 'Edit' and 'Delete' buttons.

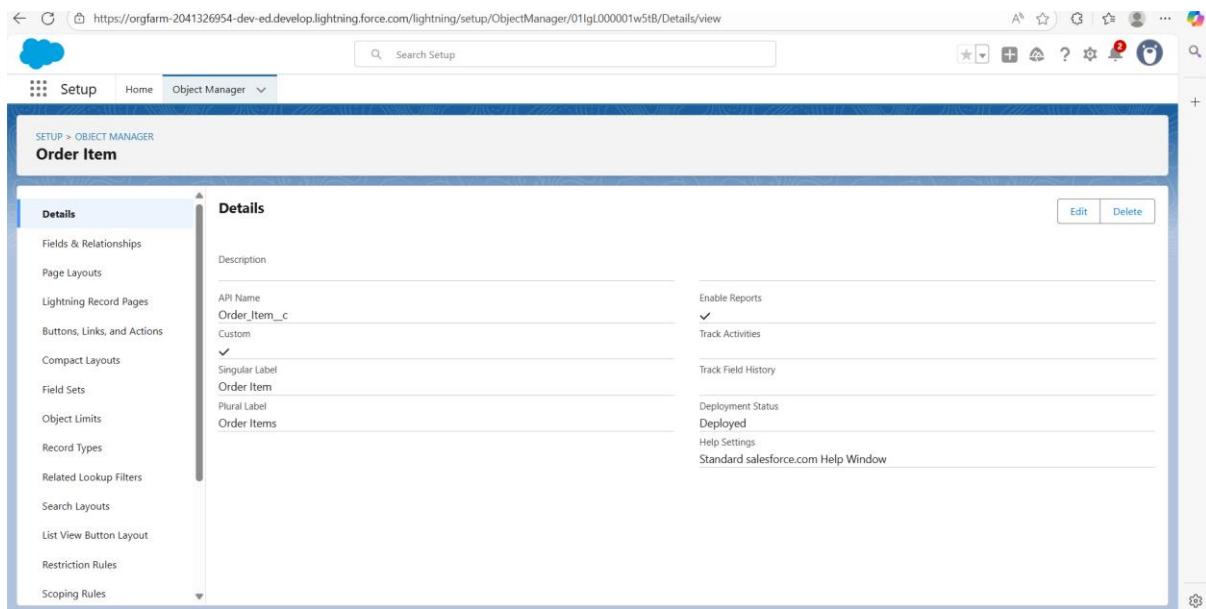


The screenshot shows the Salesforce Object Manager interface for the 'Purchase Order' object. The left sidebar lists the same configuration options as the Product screen. The main 'Details' tab displays the following information:

Field	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

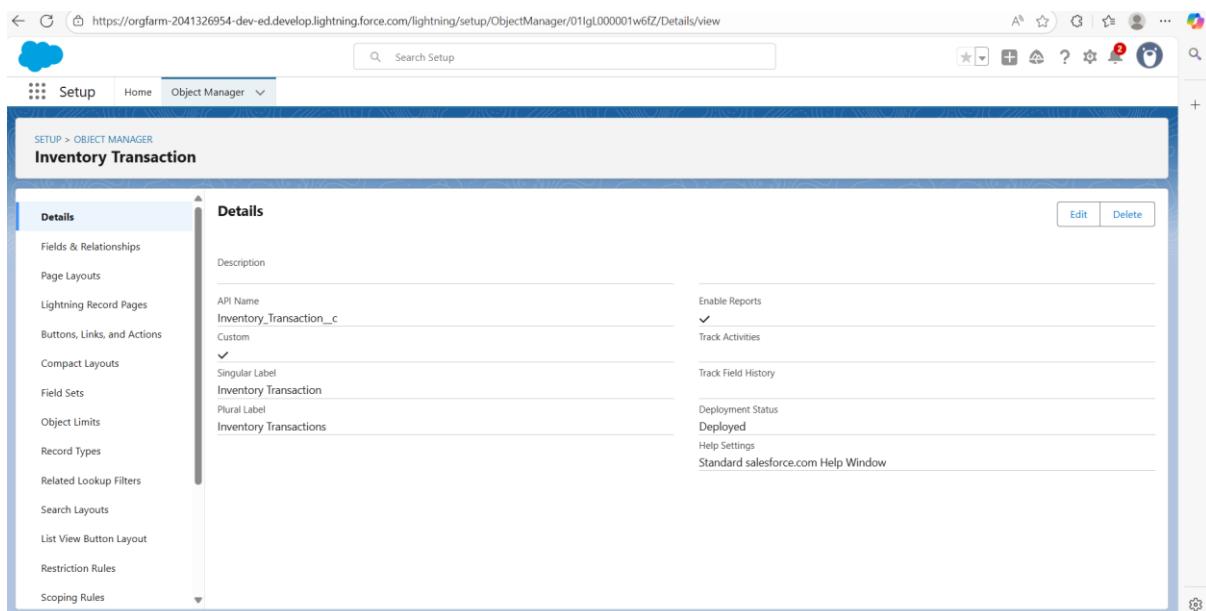
At the bottom right of the main area are 'Edit' and 'Delete' buttons.

https://orgfarm-2041326954-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01IgI000001w5tB/Details/view



The screenshot shows the Salesforce Object Manager interface for the 'Order Item' object. The left sidebar lists various setup categories: 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, and Scoping Rules. The main 'Details' tab is selected. The 'Description' section contains the API Name 'Order_Item__c' and a custom label 'Order Item'. Other settings include 'Enable Reports' (unchecked), 'Track Activities' (unchecked), 'Track Field History' (unchecked), 'Deployment Status' set to 'Deployed', and a help link to 'Standard salesforce.com Help Window'.

https://orgfarm-2041326954-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01IgI000001w6fZ/Details/view



The screenshot shows the Salesforce Object Manager interface for the 'Inventory Transaction' object. The left sidebar lists the same setup categories as the previous screenshot. The main 'Details' tab is selected. The 'Description' section contains the API Name 'Inventory_Transaction__c' and a custom label 'Inventory Transaction'. Other settings include 'Enable Reports' (unchecked), 'Track Activities' (unchecked), 'Track Field History' (unchecked), 'Deployment Status' set to 'Deployed', and a help link to 'Standard salesforce.com Help Window'.

The screenshot shows the Salesforce Setup interface with the URL <https://orgfarm-2041326954-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgL000001w6in/Details/view>. The page title is "Supplier". The left sidebar lists various setup categories under "Object Manager". The main content area displays the "Details" tab for the "Supplier" object. It includes fields for API Name (Supplier__c), Singular Label (Supplier), Plural Label (Suppliers), and Deployment Status (Deployed). Buttons for "Edit" and "Delete" are located at the top right.

Created Tabs for Custom Objects:

The screenshot shows the Salesforce Setup interface with the URL <https://orgfarm-2041326954-dev-ed.develop.lightning.force.com/lightning/setup/CustomTabs/home>. The page title is "Custom Tabs". The left sidebar shows "User Interface" and "Tabs" selected. The main content area displays a table of "Custom Object Tabs" with columns for Action, Label, Tab Style, and Description. The table shows tabs for Inventory Transactions, Order Items, Products, Purchase Orders, and Suppliers, all styled as Stethoscopes. Below this are sections for "Web Tabs" and "Visualforce Tabs", both currently empty.

Configured fields and relationships:

The screenshot shows the Salesforce Object Manager interface for the 'Product' object. The left sidebar lists various setup options like Details, Fields & Relationships, Page Layouts, etc. The main content area is titled 'Fields & Relationships' and displays 8 items, sorted by Field Label. 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)		
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)		

The screenshot shows the Salesforce Object Manager interface for the 'Purchase Order' object. The left sidebar lists various setup options like Details, Fields & Relationships, Page Layouts, etc. The main content area is titled 'Fields & Relationships' and displays 11 items, sorted by Field Label. The table columns are FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Actual Delivery Date	Actual_Delivery_Date__c	Date		
Created By	CreatedById	Lookup(User)		
Expected Delivery Date	Expected_Delivery_Date__c	Date		
Last Modified By	LastModifiedById	Lookup(User)		
Order Count	Order_Count__c	Roll-Up Summary (COUNT Order Item)		
Order Date	Order_Date__c	Date		
Order Item	Order_Item__c	Lookup(Order Item)	✓	
Owner	OwnerId	Lookup(User,Group)	✓	
Purchase Order Id	Name	Text(80)	✓	
Supplier ID	Supplier_ID__c	Lookup(Supplier)	✓	

https://orgfarm-2041326954-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IgL000001w5tB/FieldsAndRelationships/view

Setup Home Object Manager

SETUP > OBJECT MANAGER
Order Item

Details

Fields & Relationships
8 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Amount	Amount__c	Formula (Currency)		
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Order Item Id	Name	Text(80)		✓
Product	Product__c	Master-Detail(Product)		✓
Purchase Order	Purchase_Order__c	Master-Detail(Purchase Order)		✓
Quantity Received	Quantity_Received__c	Number(16, 2)		
Unit Price	Unit_Price__c	Formula (Currency)		

Quick Find New Deleted Fields Field Dependencies Set History Tracking

https://orgfarm-2041326954-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IgL000001w6fZ/FieldsAndRelationships/view

Setup Home Object Manager

SETUP > OBJECT MANAGER
Inventory Transaction

Details

Fields & Relationships
6 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Inventory Transaction Id	Name	Text(80)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Purchase Order	Purchase_Order__c	Master-Detail(Purchase Order)		✓
Total Order Cost	Total_Order_Cost__c	Formula (Currency)		
Transaction Type	Transaction_Type__c	Picklist		

Quick Find New Deleted Fields Field Dependencies Set History Tracking

The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The main title is 'Supplier'. On the left, a sidebar lists various setup options under 'Fields & Relationships'. The main content area is titled 'Fields & Relationships' with a sub-header '6 Items, Sorted by Field Label'. It displays a table with columns: FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The table rows are:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedBy	Lookup(User)		
Email	Email__c	Email		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Phone Number	Phone_Number__c	Phone		
Supplier Id	Name	Text(80)		✓

Developed Lightning App with relevant tabs:

The screenshot shows the Lightning App Builder interface. The top navigation bar includes 'Lightning App Builder', 'App Settings', 'Pages', and 'Medical Inventory Management'. The main content area is titled 'App Details & Branding'. The left sidebar shows 'App Settings' with a selected 'App Details & Branding' tab. The right panel contains sections for 'App Details' and 'App Branding'. In 'App Details', fields include 'App Name' (Medical Inventory Management), 'Developer Name' (Medical_Inventory_Management), and 'Description' (Enter a description...). In 'App Branding', there is a preview image of a medical inventory icon, a color picker set to '#0070D2', and an 'Org Theme Options' checkbox. Below these are 'App Launcher Preview' and a preview of the app icon and name.

Lightning App Builder | App Settings | Pages | Medical Inventory Management | Help

App Settings

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

Type to filter list...

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

Selected Items

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

+

Lightning App Builder | App Settings | Pages | Medical Inventory Management | Help

App Settings

User Profiles

Choose the user profiles that can access this app.

Available Profiles

Type to filter list...

- Analytics Cloud Integration User
- Analytics Cloud Security User
- Anypoint Integration
- Authenticated Website
- Authenticated Website
- B2B Reordering Portal Buyer Profile
- Contract Manager
- Custom: Marketing Profile
- Custom: Sales Profile
- Custom: Support Profile
- Customer Community Login User

Selected Profiles

- System Administrator
- Inventory Manager
- Purchase Manager

+

Screenshot of the Salesforce Lightning Experience showing a list of Order Items. The list includes columns for Product ID, Name, and Unit Price. A search bar at the top right allows filtering by name.

Editing of Page Layouts:

Screenshot of the Salesforce Setup page for editing a Product page layout. The left sidebar shows navigation options like Details, Fields & Relationships, Page Layouts, and Lightning Record Pages. The main area shows the Page Layout editor with sections for Fields, Actions, and Product Detail.

https://orgfarm-2041326954-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IgL000001w5l6/PageLayouts/00hgL000006gQCMQA2/view

The screenshot shows the Salesforce Setup interface for editing a page layout. The object is 'Purchase Order'. The 'Page Layouts' tab is selected in the sidebar. The main area displays the 'Purchase Order Detail' section with various fields and their values. A 'Layout Properties' toolbar is at the top, and a 'Quick Find' search bar is present. The page includes standard buttons like Edit, Delete, Clone, Change Owner, Change Record Type, Printable View, Sharing, Sharing Hierarchy, and Edit Labels.

https://orgfarm-2041326954-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IgL000001w5tB/PageLayouts/00hgL000006gRA1QAM/view

The screenshot shows the Salesforce Setup interface for editing a page layout. The object is 'Order Item'. The 'Page Layouts' tab is selected in the sidebar. The main area displays the 'Order Item Detail' section with various fields and their values. A 'Layout Properties' toolbar is at the top, and a 'Quick Find' search bar is present. The page includes standard buttons like Edit, Delete, Clone, Change Owner, Change Record Type, Printable View, Sharing, Sharing Hierarchy, and Edit Labels.

https://orgfarm-2041326954-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgL000001w6fZ/PageLayouts/00hgL000006gT3lQAE/view

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 *
Buttons Last Modified By
Quick Actions Purchase Order
Mobile & Lightning Actions Blank Space
Expanded Lookups Created By Total Order Cost
Related Lists Inventory Transac... Transaction Type
Report Charts

Label Transaction Type
Name Transaction_Type
Type Picklist

Information (Header visible on edit only)
* Inventory Transaction ID Sample Text
* Purchase Order Transaction Type Sample Text
Total Order Cost \$123.45

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.

https://orgfarm-2041326954-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgL000001w6fZ/PageLayouts/00hgL000006gT6zQAE/view

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 *
Buttons Last Modified By
Quick Actions Owner
Mobile & Lightning Actions Blank Space
Expanded Lookups Created By Phone Number
Related Lists Email Supplier ID
Report Charts

The Quick Actions in the Salesforce Classic Publisher section, and have saved the layout, then this section inherits that set of actions by default when you click to override.

Supplier Detail Standard Buttons Edit Delete Clone Change Owner Change Record Type Printable View Sharing Sharing Hierarchy Edit Labels Custom Buttons

Information (Header visible on edit only)
* Supplier ID Sample Text * Phone Number 1-415-555-1212
Email sarah.sample@company.com
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.

Compact Layout created for Product and Purchase Order Objects:

The screenshot shows the Salesforce Setup interface for creating a 'Product Compact Layout'. The left sidebar navigation includes 'Setup', 'Home', 'Object Manager', and a search bar. Under 'Object Manager', the 'Product' object is selected. In the main content area, the 'Compact Layouts' tab is active. A modal window titled 'Product Compact Layout' is open, showing the 'Enter Compact Layout Information' section where the label 'Product Compact Layout' and name 'Product_Compact_Layout' are specified. Below this is the 'Select Compact Layout Fields' section, which lists available fields like 'Created By', 'Last Modified By', 'Owner', and 'Product ID', and selected fields like 'Product Name', 'Unit Price', and 'Current Stock Level'. Buttons for 'Add', 'Remove', and reordering (Top, Up, Down, Bottom) are present. A note at the bottom states: 'Use SHIFT + click to select adjacent fields. Use CTRL + click to select an assortment of fields.' At the bottom of the modal are 'Save' and 'Cancel' buttons.

The screenshot shows the Salesforce Setup interface displaying the details of the 'Product Compact Layout' created earlier. The left sidebar navigation is identical to the previous screenshot. The main content area shows the 'Compact Layout Detail' for the 'Product Compact Layout'. The details include the label 'Product Compact Layout', API name 'Product_Compact_Layout', and included fields 'Product Name', 'Unit Price', and 'Current Stock Level'. The 'Created By' field shows 'Selvamhika M' with a timestamp of '9/3/2025, 12:01 AM'. The 'Modified By' field also shows 'Selvamhika M' with the same timestamp. Action buttons for 'Edit', 'Clone', 'Delete', and 'Compact Layout Assignment' are visible. A note at the top right says 'Help for this Page'. The bottom of the page has standard Salesforce footer links.

https://orgfarm-2041326954-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01lgL000001w5l6/CompactLayouts/0AHgL000000Dvjd/edit

Setup Home Object Manager

SETUP > OBJECT MANAGER Purchase Order

Purchase Order Compact Layout

Compact layouts are used in the mobile app and some Chatter feed items to display a record's key fields at a glance. You can select and prioritize up to ten fields for the compact layout, but the number of fields that display may vary based on the device's screen, which record page is being viewed, and the permissions of the user.

Compact Layout Edit Save Cancel

Enter Compact Layout Information I Required Information

Label Purchase Order Compact Layout

Name Purchase_Order_Compact

Select Compact Layout Fields

Available Fields Selected Fields

Actual Delivery Date	Purchase Order Id
Created By	Order Date
Expected Delivery Date	Total Order Cost
Last Modified By	Supplier ID
Order Count	Top
Order Item	Up
Owner	Remove

Use SHIFT + click to select adjacent fields. Use CTRL + click to select an assortment of fields.

Save Cancel

https://orgfarm-2041326954-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01lgL000001w5l6/CompactLayouts/0AHgL000000Dvjd/view

Setup Home Object Manager

SETUP > OBJECT MANAGER Purchase Order

Purchase Order Compact Layout Help for this Page

= Back to Purchase Order

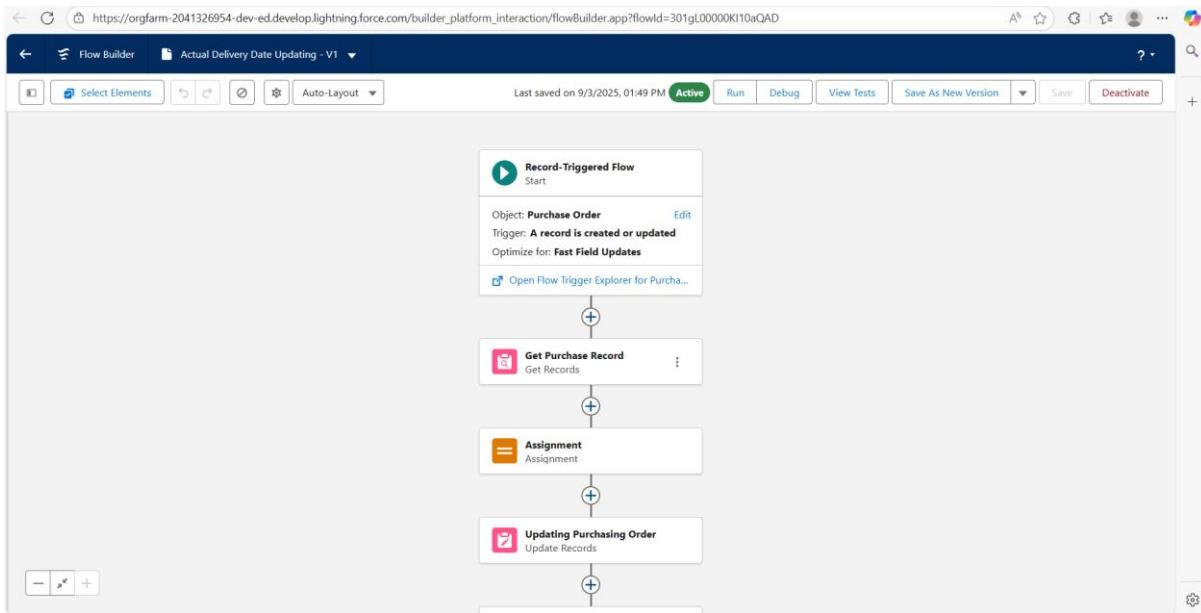
Compact Layout Detail

Edit Clone Delete Compact Layout Assignment

Object Name Purchase Order

Label	Purchase Order Compact Layout
API Name	Purchase_Order_Compact_Layout
Included Fields	Purchase Order Id Order Date Total Order Cost Supplier ID
Created By	Selvambika M. 9/3/2025, 12:04 AM
Modified By	Selvambika M. 9/10/2025, 8:58 AM

Implemented Flows for Actual Delivery Date Updating:



To create a validation rule to a purchase order:

The screenshot shows the 'Validation Rule Edit' screen for a 'Purchase Order' object. A new validation rule is being created with the following details:

- Rule Name:** Expected_Delivery_Date_Validation
- Active:** Checked
- Description:** (empty)

The **Error Condition Formula** field contains the formula: `(Expected_Delivery_Date__c - Order_Date__c) > ?`. The formula example provided is `Discount_Percent_c>0.30`. The formula editor includes a 'More Examples...' link, an 'Insert Field' button, an 'Insert Operator' dropdown, and a 'Check Syntax' button. A sidebar on the right lists available functions under 'All Function Categories'.

The screenshot shows the Salesforce Setup interface under the Object Manager section for the Purchase Order object. A validation rule named "Expected_Delivery_Date_Validation" is displayed. The rule checks if the Expected Delivery Date is greater than 7 days from the Order Date. It is active and located at the top of the page. The rule was created by Selvambika M. on 9/3/2025 at 12:14 AM.

Creating Profiles for Inventory and Purchase Manager:

The screenshot shows the Salesforce Setup Profiles screen. A new profile named "Inventory Manager" is being created. The user license is set to "Salesforce". The profile is a custom profile. In the "Custom App Settings" section, various apps are listed with checkboxes for "Visible" and "Default".

App	Visible	Default
All Tabs (standard__AltTabSet)	<input checked="" type="checkbox"/>	<input type="radio"/>
Analytics Studio (standard__Insights)	<input checked="" type="checkbox"/>	<input type="radio"/>
App Launcher (standard__AppLauncher)	<input checked="" type="checkbox"/>	<input type="radio"/>
Approvals (standard__Approvals)	<input checked="" type="checkbox"/>	<input type="radio"/>
Automation (standard__FlowApp)	<input checked="" type="checkbox"/>	<input type="radio"/>
Bolt Solutions (standard__LightningBolt)	<input checked="" type="checkbox"/>	<input type="radio"/>
Community (standard__Community)	<input checked="" type="checkbox"/>	<input type="radio"/>
Content (standard__Content)	<input checked="" type="checkbox"/>	<input type="radio"/>
Data Cloud (standard__Audience360)	<input checked="" type="checkbox"/>	<input type="radio"/>
Data Manager (standard__DataManager)	<input checked="" type="checkbox"/>	<input type="radio"/>
My Service Journey (standard__MSJApp)	<input checked="" type="checkbox"/>	<input type="radio"/>
Queue Management (standard__QueueManagement)	<input checked="" type="checkbox"/>	<input type="radio"/>
Sales (standard__LightningSales)	<input checked="" type="checkbox"/>	<input type="radio"/>
Sales (standard__Sales)	<input checked="" type="checkbox"/>	<input type="radio"/>
Sales Cloud Mobile (standard__SalesCloudMobile)	<input checked="" type="checkbox"/>	<input type="radio"/>
Sales Console (standard__LightningSalesConsole)	<input checked="" type="checkbox"/>	<input type="radio"/>
Salesforce Chatter (standard__Chatter)	<input checked="" type="checkbox"/>	<input type="radio"/>
Salesforce Scheduler Setup (standard__LightningScheduler)	<input type="checkbox"/>	<input type="radio"/>
Sample Console (standard__ServiceConsole)	<input type="checkbox"/>	<input type="radio"/>
Service (standard__Service)	<input checked="" type="checkbox"/>	<input type="radio"/>

https://orgfarm-2041326954-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00egL000004N3J3

The screenshot shows the Salesforce Setup interface under the Profiles section. A search bar at the top left contains 'prof'. The main content area displays the 'Inventory Manager' profile. It includes a 'Profile Detail' section with fields like Name (Inventory Manager), User License (Salesforce), and Description (Selvambika M. 9/3/2025, 12:16 AM). Below this is a 'Page Layouts' section showing various standard object layouts assigned to the profile. A message at the bottom states: '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.' A note at the bottom also says: 'If you are using Global Search, try using Global Search.'

https://orgfarm-2041326954-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00egL000004N3P%2Fe%3FretURL%3D%252F00e%253Fcdf%253...

The screenshot shows the Salesforce Setup interface under the Profiles section. A search bar at the top left contains 'prof'. The main content area displays the 'Purchase Manager' profile. It includes a 'Profile Edit' section with fields like Name (Purchase Manager), User License (Salesforce), and Description (Selvambika M. 9/3/2025, 12:16 AM). Below this is a 'Custom App Settings' section where administrators can manage visibility and default settings for various standard tabs and apps. A note at the bottom states: 'Set the permissions and page layouts for this profile. Try using Global Search.'

The screenshot shows the Salesforce Setup interface with the URL <https://orgfarm-2041326954-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00egL000004N3PV>. The page title is "Profiles" under the "SETUP" tab. A search bar at the top right contains "Search Setup". The left sidebar shows "Users" and "Profiles" under "Profiles". The main content area is titled "Purchase Manager" and displays profile details: Name (Purchase Manager), User License (Salesforce), Description (None), Created By (Selvambika M, 9/3/2025, 12:19 AM), Modified By (Selvambika M, 9/10/2025, 9:17 AM). It also lists "Page Layouts" for various objects like Global, Email Application, Home Page Layout, Account, Alternative Payment Method, and Opportunity Product.

Creating Roles for Inventory and Purchase Manager:

The screenshot shows the Salesforce Setup interface with the URL <https://orgfarm-2041326954-dev-ed.develop.lightning.force.com/lightning/setup/Roles/page?address=%2F00EgL000004zMr%2Fe%3Fsetupid%3DRoles%26retURL%3D%252F00EgL000004N3PV%253fapp.layout%253dsetup%2526tour%253D%2526edtp%253D%2526p1%2526fdfclFrameOrigin%253Dhttps...>. The page title is "Roles" under the "SETUP" tab. The left sidebar shows "Users" and "Roles" under "Feature Settings". The main content area is titled "Role Edit" for "Inventory Manager". The "Label" field is set to "Inventory Manager" and the "Role Name" field is set to "Inventory_Manager". The "This role reports to" dropdown is set to "SVP. Sales & Marketing". The "Role Name as displayed on reports" field is empty. At the bottom are "Save", "Save & New", and "Cancel" buttons.

https://orgfarm-2041326954-dev-ed.lightning.force.com/lightning/setup/Roles/page?address=%2F00EgL0000042zMr%3Fsetupid%3DRoles%26appLayout%3Dsetup%26tour%3...

Setup Home Object Manager

roles

Users Roles

Feature Settings Sales Contact Roles on Contracts Contact Roles on Opportunities Service Case Teams Case Team Roles Contact Roles on Cases

Inventory Manager

Role Detail

	Label	Role Name	Role Name as displayed on reports
This role reports to	SVP_Sales & Marketing	Inventory_Manager	Role Name as displayed on reports
Modified By	Satvamika M	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 Inventory Manager Role [0]

Help for this Page ?

Users in Inventory Manager Role

No records to display

Assign Users to Role New User

Users in Inventory Manager Role Help ?

https://orgfarm-2041326954-dev-ed.lightning.force.com/lightning/setup/Roles/page?address=%2F00EgL0000042zGP%2Fe%3Fsetupid%3DRoles%26retURL%3D%252F00EgL00...

Setup Home Object Manager

roles

Users Roles

Feature Settings Sales Contact Roles on Contracts Contact Roles on Opportunities Service Case Teams Case Team Roles Contact Roles on Cases

Purchasing Manager

Role Edit

	Label	Role Name	Role Name as displayed on reports
Label	Purchasing Manager	Purchasing_Manager	
Role Name	Purchasing_Manager		
This role reports to	SVP_Sales & Marketing		
Role Name as displayed on reports			

Save Save & New Cancel

The screenshot shows the Salesforce Setup Roles page. On the left sidebar, under the 'Users' section, 'Roles' is selected. The main content area displays the 'Purchasing Manager' role details. The role has the label 'Purchasing Manager' and reports to 'SVP_Sales & Marketing'. It was modified by Selvambika M. on 9/10/2025 at 9:04 AM. The role name is 'Purchasing_Manager'. Sharing groups include 'Role' and 'Role and Internal Subordinates'. Under 'Opportunity Access', users can edit opportunities associated with accounts they own. Under 'Case Access', users can edit all cases associated with accounts they own. A link to 'Users in Purchasing Manager Role' is provided.

Created Permission Sets:

The screenshot shows the Salesforce Setup Permission Sets page. On the left sidebar, 'Permission Sets' is selected. The main content area shows the 'Purchase Manager Create Access' permission set. It has the API name 'Purchase_Manager' and namespace prefix 'Selvambika_M'. It was created by Selvambika M. on 9/3/2025 at 12:29 AM and last modified by Selvambika M. on 9/3/2025 at 12:31 AM. The 'Permission Set Overview' section includes fields for description, license, session activation required, and permission set groups added to. The 'Apps' section lists various app settings: Assigned Apps, Assigned Connected Apps, Object Settings, App Permissions, Apex Class Access, Visualforce Page Access, and External Data Source Access.

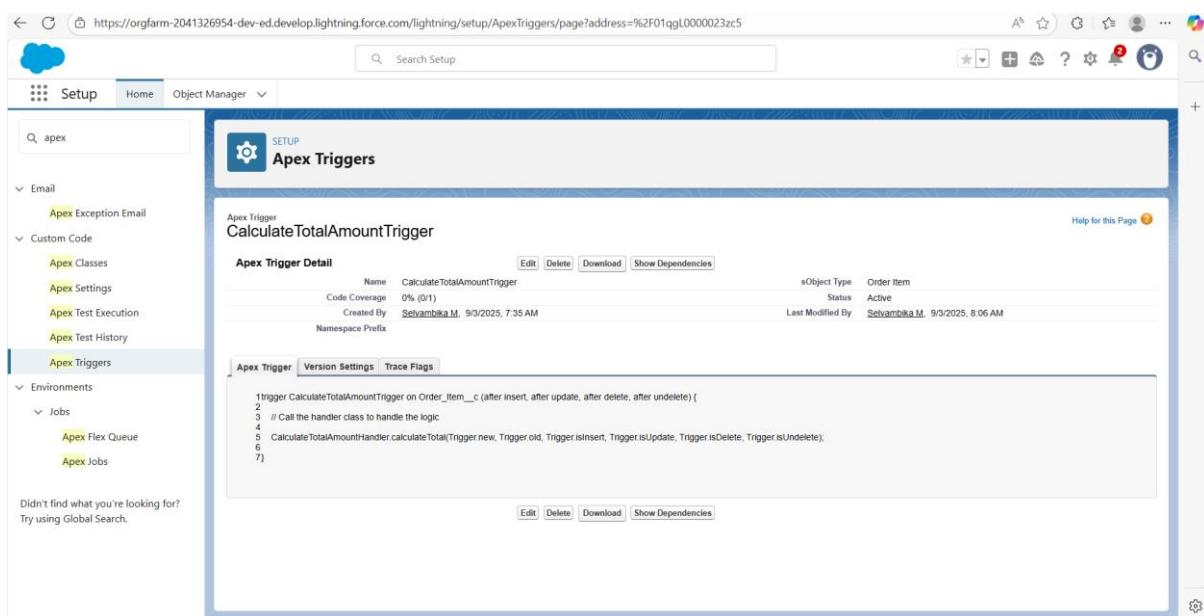
Creating Apex Trigger for Calculating Amount:



The screenshot shows the Salesforce developer console at the URL https://orgfarm-2041326954-dev-ed.develop.my.salesforce.com/_ui/common/apex/debug/ApexCsPage. The page displays the code for the `CalculateTotalAmountTrigger` apex trigger. The code is as follows:

```
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);
}
```

The developer console interface includes tabs for File, Edit, Debug, Test, Workspace, Help, and a toolbar with various icons. Below the code editor is a log viewer tab bar with options like Logs, Tests, Checkpoints, Query Editor, View State, Progress, and Problems. The logs section is currently selected.



The screenshot shows the Salesforce Setup Apex Triggers page at the URL <https://orgfarm-2041326954-dev-ed.develop.lightning.force.com/lightning/setup/ApexTriggers/page?address=%2F01ql0000023zc5>. The page displays the details for the `CalculateTotalAmountTrigger` apex trigger. The trigger details are:

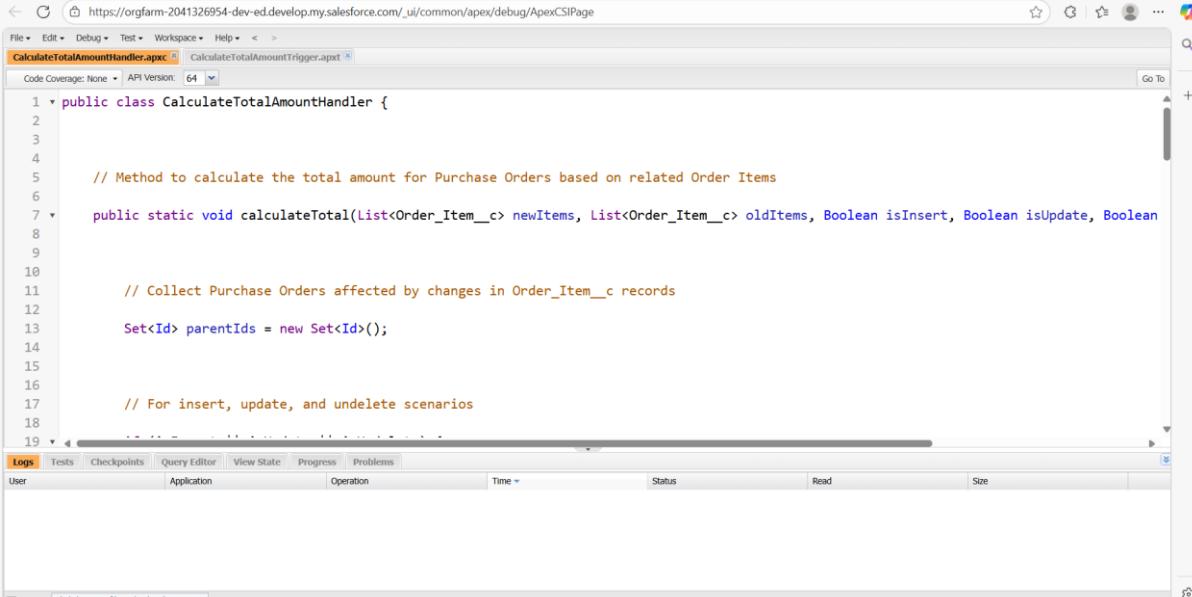
Name	CalculateTotalAmountTrigger	sObject Type	Order Item
Code Coverage	0% (0/1)	Status	Active
Created By	Selvamika M.	Last Modified By	Selvamika M.
Namespace Prefix			

The trigger logic is displayed in the Apex Trigger tab:

```
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);
}
```

The left sidebar shows the navigation menu for Apex triggers, including Email, Custom Code, Environments, and Jobs.

Creating Apex Classes for Calculating Amount Handler:



The screenshot shows the Salesforce Developer Console interface. The URL is https://orgfarm-2041326954-dev-ed.develop.my.salesforce.com/_ui/common/apex/debug/ApexCSIPage. The tab title is "CalculateTotalAmountHandler.apxc". The code editor displays the following Apex class:

```
1 public class CalculateTotalAmountHandler {  
2  
3  
4 // Method to calculate the total amount for Purchase Orders based on related Order Items  
5  
6 public static void calculateTotal(List<Order_Item__c> newItems, List<Order_Item__c> oldItems, Boolean isInsert, Boolean isUpdate, Boolean  
7  
8 // Collect Purchase Orders affected by changes in Order_Item__c records  
9  
10 Set<Id> parentIds = new Set<Id>();  
11  
12 // For insert, update, and undelete scenarios  
13  
14  
15  
16  
17  
18  
19  
20  
21  
22  
23  
24  
25  
26  
27  
28  
29  
30  
31  
32  
33  
34  
35  
36  
37  
38  
39  
40  
41  
42  
43  
44  
45  
46  
47  
48  
49  
50  
51  
52  
53  
54  
55  
56  
57  
58  
59  
60  
61  
62  
63  
64  
65  
66  
67  
68  
69  
70  
71  
72  
73  
74  
75  
76  
77  
78  
79  
80  
81  
82  
83  
84  
85  
86  
87  
88  
89  
90  
91  
92  
93  
94  
95  
96  
97  
98  
99  
100  
101  
102  
103  
104  
105  
106  
107  
108  
109  
110  
111  
112  
113  
114  
115  
116  
117  
118  
119  
120  
121  
122  
123  
124  
125  
126  
127  
128  
129  
130  
131  
132  
133  
134  
135  
136  
137  
138  
139  
140  
141  
142  
143  
144  
145  
146  
147  
148  
149  
150  
151  
152  
153  
154  
155  
156  
157  
158  
159  
160  
161  
162  
163  
164  
165  
166  
167  
168  
169  
170  
171  
172  
173  
174  
175  
176  
177  
178  
179  
180  
181  
182  
183  
184  
185  
186  
187  
188  
189  
190  
191  
192  
193  
194  
195  
196  
197  
198  
199  
200  
201  
202  
203  
204  
205  
206  
207  
208  
209  
210  
211  
212  
213  
214  
215  
216  
217  
218  
219  
220  
221  
222  
223  
224  
225  
226  
227  
228  
229  
230  
231  
232  
233  
234  
235  
236  
237  
238  
239  
240  
241  
242  
243  
244  
245  
246  
247  
248  
249  
250  
251  
252  
253  
254  
255  
256  
257  
258  
259  
260  
261  
262  
263  
264  
265  
266  
267  
268  
269  
270  
271  
272  
273  
274  
275  
276  
277  
278  
279  
280  
281  
282  
283  
284  
285  
286  
287  
288  
289  
290  
291  
292  
293  
294  
295  
296  
297  
298  
299  
300  
301  
302  
303  
304  
305  
306  
307  
308  
309  
310  
311  
312  
313  
314  
315  
316  
317  
318  
319  
320  
321  
322  
323  
324  
325  
326  
327  
328  
329  
330  
331  
332  
333  
334  
335  
336  
337  
338  
339  
340  
341  
342  
343  
344  
345  
346  
347  
348  
349  
350  
351  
352  
353  
354  
355  
356  
357  
358  
359  
360  
361  
362  
363  
364  
365  
366  
367  
368  
369  
370  
371  
372  
373  
374  
375  
376  
377  
378  
379  
380  
381  
382  
383  
384  
385  
386  
387  
388  
389  
390  
391  
392  
393  
394  
395  
396  
397  
398  
399  
400  
401  
402  
403  
404  
405  
406  
407  
408  
409  
410  
411  
412  
413  
414  
415  
416  
417  
418  
419  
420  
421  
422  
423  
424  
425  
426  
427  
428  
429  
430  
431  
432  
433  
434  
435  
436  
437  
438  
439  
440  
441  
442  
443  
444  
445  
446  
447  
448  
449  
450  
451  
452  
453  
454  
455  
456  
457  
458  
459  
460  
461  
462  
463  
464  
465  
466  
467  
468  
469  
470  
471  
472  
473  
474  
475  
476  
477  
478  
479  
480  
481  
482  
483  
484  
485  
486  
487  
488  
489  
490  
491  
492  
493  
494  
495  
496  
497  
498  
499  
500  
501  
502  
503  
504  
505  
506  
507  
508  
509  
510  
511  
512  
513  
514  
515  
516  
517  
518  
519  
520  
521  
522  
523  
524  
525  
526  
527  
528  
529  
530  
531  
532  
533  
534  
535  
536  
537  
538  
539  
540  
541  
542  
543  
544  
545  
546  
547  
548  
549  
550  
551  
552  
553  
554  
555  
556  
557  
558  
559  
559  
560  
561  
562  
563  
564  
565  
566  
567  
568  
569  
569  
570  
571  
572  
573  
574  
575  
576  
577  
578  
579  
579  
580  
581  
582  
583  
584  
585  
586  
587  
588  
589  
589  
590  
591  
592  
593  
594  
595  
596  
597  
598  
599  
599  
600  
601  
602  
603  
604  
605  
606  
607  
608  
609  
609  
610  
611  
612  
613  
614  
615  
616  
617  
618  
619  
619  
620  
621  
622  
623  
624  
625  
626  
627  
628  
629  
629  
630  
631  
632  
633  
634  
635  
636  
637  
638  
639  
639  
640  
641  
642  
643  
644  
645  
646  
647  
648  
649  
649  
650  
651  
652  
653  
654  
655  
656  
657  
658  
659  
659  
660  
661  
662  
663  
664  
665  
666  
667  
668  
669  
669  
670  
671  
672  
673  
674  
675  
676  
677  
678  
679  
679  
680  
681  
682  
683  
684  
685  
686  
687  
688  
689  
689  
690  
691  
692  
693  
694  
695  
696  
697  
698  
699  
699  
700  
701  
702  
703  
704  
705  
706  
707  
708  
709  
709  
710  
711  
712  
713  
714  
715  
716  
717  
718  
719  
719  
720  
721  
722  
723  
724  
725  
726  
727  
728  
729  
729  
730  
731  
732  
733  
734  
735  
736  
737  
738  
739  
739  
740  
741  
742  
743  
744  
745  
746  
747  
748  
749  
749  
750  
751  
752  
753  
754  
755  
756  
757  
758  
759  
759  
760  
761  
762  
763  
764  
765  
766  
767  
768  
769  
769  
770  
771  
772  
773  
774  
775  
776  
777  
778  
779  
779  
780  
781  
782  
783  
784  
785  
786  
787  
788  
789  
789  
790  
791  
792  
793  
794  
795  
796  
797  
798  
799  
799  
800  
801  
802  
803  
804  
805  
806  
807  
808  
809  
809  
810  
811  
812  
813  
814  
815  
816  
817  
818  
819  
819  
820  
821  
822  
823  
824  
825  
826  
827  
828  
829  
829  
830  
831  
832  
833  
834  
835  
836  
837  
838  
839  
839  
840  
841  
842  
843  
844  
845  
846  
847  
848  
849  
849  
850  
851  
852  
853  
854  
855  
856  
857  
858  
859  
859  
860  
861  
862  
863  
864  
865  
866  
867  
868  
869  
869  
870  
871  
872  
873  
874  
875  
876  
877  
878  
879  
879  
880  
881  
882  
883  
884  
885  
886  
887  
888  
889  
889  
890  
891  
892  
893  
894  
895  
896  
897  
898  
899  
899  
900  
901  
902  
903  
904  
905  
906  
907  
908  
909  
909  
910  
911  
912  
913  
914  
915  
916  
917  
918  
919  
919  
920  
921  
922  
923  
924  
925  
926  
927  
928  
929  
929  
930  
931  
932  
933  
934  
935  
936  
937  
938  
939  
939  
940  
941  
942  
943  
944  
945  
946  
947  
948  
949  
949  
950  
951  
952  
953  
954  
955  
956  
957  
958  
959  
959  
960  
961  
962  
963  
964  
965  
966  
967  
968  
969  
969  
970  
971  
972  
973  
974  
975  
976  
977  
978  
979  
979  
980  
981  
982  
983  
984  
985  
986  
987  
988  
989  
989  
990  
991  
992  
993  
994  
995  
996  
997  
998  
999  
999  
1000  
1001  
1002  
1003  
1004  
1005  
1006  
1007  
1008  
1009  
1009  
1010  
1011  
1012  
1013  
1014  
1015  
1016  
1017  
1018  
1019  
1019  
1020  
1021  
1022  
1023  
1024  
1025  
1026  
1027  
1028  
1029  
1029  
1030  
1031  
1032  
1033  
1034  
1035  
1036  
1037  
1038  
1039  
1039  
1040  
1041  
1042  
1043  
1044  
1045  
1046  
1047  
1048  
1049  
1049  
1050  
1051  
1052  
1053  
1054  
1055  
1056  
1057  
1058  
1059  
1059  
1060  
1061  
1062  
1063  
1064  
1065  
1066  
1067  
1068  
1069  
1069  
1070  
1071  
1072  
1073  
1074  
1075  
1076  
1077  
1078  
1079  
1079  
1080  
1081  
1082  
1083  
1084  
1085  
1086  
1087  
1088  
1089  
1089  
1090  
1091  
1092  
1093  
1094  
1095  
1096  
1097  
1098  
1099  
1099  
1100  
1101  
1102  
1103  
1104  
1105  
1106  
1107  
1108  
1109  
1109  
1110  
1111  
1112  
1113  
1114  
1115  
1116  
1117  
1118  
1119  
1119  
1120  
1121  
1122  
1123  
1124  
1125  
1126  
1127  
1128  
1129  
1129  
1130  
1131  
1132  
1133  
1134  
1135  
1136  
1137  
1138  
1139  
1139  
1140  
1141  
1142  
1143  
1144  
1145  
1146  
1147  
1148  
1149  
1149  
1150  
1151  
1152  
1153  
1154  
1155  
1156  
1157  
1158  
1159  
1159  
1160  
1161  
1162  
1163  
1164  
1165  
1166  
1167  
1168  
1169  
1169  
1170  
1171  
1172  
1173  
1174  
1175  
1176  
1177  
1178  
1179  
1179  
1180  
1181  
1182  
1183  
1184  
1185  
1186  
1187  
1188  
1189  
1189  
1190  
1191  
1192  
1193  
1194  
1195  
1196  
1197  
1198  
1199  
1199  
1200  
1201  
1202  
1203  
1204  
1205  
1206  
1207  
1208  
1209  
1209  
1210  
1211  
1212  
1213  
1214  
1215  
1216  
1217  
1218  
1219  
1219  
1220  
1221  
1222  
1223  
1224  
1225  
1226  
1227  
1228  
1229  
1229  
1230  
1231  
1232  
1233  
1234  
1235  
1236  
1237  
1238  
1239  
1239  
1240  
1241  
1242  
1243  
1244  
1245  
1246  
1247  
1248  
1249  
1249  
1250  
1251  
1252  
1253  
1254  
1255  
1256  
1257  
1258  
1259  
1259  
1260  
1261  
1262  
1263  
1264  
1265  
1266  
1267  
1268  
1269  
1269  
1270  
1271  
1272  
1273  
1274  
1275  
1276  
1277  
1278  
1279  
1279  
1280  
1281  
1282  
1283  
1284  
1285  
1286  
1287  
1288  
1289  
1289  
1290  
1291  
1292  
1293  
1294  
1295  
1296  
1297  
1298  
1299  
1299  
1300  
1301  
1302  
1303  
1304  
1305  
1306  
1307  
1308  
1309  
1309  
1310  
1311  
1312  
1313  
1314  
1315  
1316  
1317  
1318  
1319  
1319  
1320  
1321  
1322  
1323  
1324  
1325  
1326  
1327  
1328  
1329  
1329  
1330  
1331  
1332  
1333  
1334  
1335  
1336  
1337  
1338  
1339  
1339  
1340  
1341  
1342  
1343  
1344  
1345  
1346  
1347  
1348  
1349  
1349  
1350  
1351  
1352  
1353  
1354  
1355  
1356  
1357  
1358  
1359  
1359  
1360  
1361  
1362  
1363  
1364  
1365  
1366  
1367  
1368  
1369  
1369  
1370  
1371  
1372  
1373  
1374  
1375  
1376  
1377  
1378  
1379  
1379  
1380  
1381  
1382  
1383  
1384  
1385  
1386  
1387  
1388  
1389  
1389  
1390  
1391  
1392  
1393  
1394  
1395  
1396  
1397  
1398  
1399  
1399  
1400  
1401  
1402  
1403  
1404  
1405  
1406  
1407  
1408  
1409  
1409  
1410  
1411  
1412  
1413  
1414  
1415  
1416  
1417  
1418  
1419  
1419  
1420  
1421  
1422  
1423  
1424  
1425  
1426  
1427  
1428  
1429  
1429  
1430  
1431  
1432  
1433  
1434  
1435  
1436  
1437  
1438  
1439  
1439  
1440  
1441  
1442  
1443  
1444  
1445  
1446  
1447  
1448  
1449  
1449  
1450  
1451  
1452  
1453  
1454  
1455  
1456  
1457  
1458  
1459  
1459  
1460  
1461  
1462  
1463  
1464  
1465  
1466  
1467  
1468  
1469  
1469  
1470  
1471  
1472  
1473  
1474  
1475  
1476  
1477  
1478  
1479  
1479  
1480  
1481  
1482  
1483  
1484  
1485  
1486  
1487  
1488  
1489  
1489  
1490  
1491  
1492  
1493  
1494  
1495  
1496  
1497  
1498  
1499  
1499  
1500  
1501  
1502  
1503  
1504  
1505  
1506  
1507  
1508  
1509  
1509  
1510  
1511  
1512  
1513  
1514  
1515  
1516  
1517  
1518  
1519  
1519  
1520  
1521  
1522  
1523  
1524  
1525  
1526  
1527  
1528  
1529  
1529  
1530  
1531  
1532  
1533  
1534  
1535  
1536  
1537  
1538  
1539  
1539  
1540  
1541  
1542  
1543  
1544  
1545  
1546  
1547  
1548  
1549  
1549  
1550  
1551  
1552  
1553  
1554  
1555  
1556  
1557  
1558  
1559  
1559  
1560  
1561  
1562  
1563  
1564  
1565  
1566  
1567  
1568  
1569  
1569  
1570  
1571  
1572  
1573  
1574  
1575  
1576  
1577  
1578  
1579  
1579  
1580  
1581  
1582  
1583  
1584  
1585  
1586  
1587  
1588  
1589  
1589  
1590  
1591  
1592  
1593  
1594  
1595  
1596  
1597  
1598  
1599  
1599  
1600  
1601  
1602  
1603  
1604  
1605  
1606  
1607  
1608  
1609  
1609  
1610  
1611  
1612  
1613  
1614  
1615  
1616  
1617  
1618  
1619  
1619  
1620  
1621  
1622  
1623  
1624  
1625  
1626  
1627  
1628  
1629  
1629  
1630  
1631  
1632  
1633  
1634  
1635  
1636  
1637  
1638  
1639  
1639  
1640  
1641  
1642  
1643  
1644  
1645  
1646  
1647  
1648  
1649  
1649  
1650  
1651  
1652  
1653  
1654  
1655  
1656  
1657  
1658  
1659  
1659  
1660  
1661  
1662  
1663  
1664  
1665  
1666  
1667  
1668  
1669  
1669  
1670  
1671  
1672  
1673  
1674  
1675  
1676  
1677  
1678  
1679  
1679  
1680  
1681  
1682  
1683  
1684  
1685  
1686  
1687  
1688  
1689  
1689  
1690  
1691  
1692  
1693  
1694  
1695  
1696  
1697  
1698  
1699  
1699  
1700  
1701  
1702  
1703  
1704  
1705  
1706  
1707  
1708  
1709  
1709  
1710  
1711  
1712  
1713  
1714  
1715  
1716  
1717  
1718  
1719  
1719  
1720  
1721  
1722  
1723  
1724  
1725  
1726  
1727  
1728  
1729  
1729  
1730  
1731  
1732  
1733  
1734  
1735  
1736  
1737  
1738  
1739  
1739  
1740  
1741  
1742  
1743  
1744  
1745  
1746  
1747  
1748  
1749  
1749  
1750  
1751  
1752  
1753  
1754  
1755  
1756  
1757  
1758  
1759  
1759  
1760  
1761  
1762  
1763  
1764  
1765  
1766  
1767  
1768  
1769  
1769  
1770  
1771  
1772  
1773  
1774  
1775  
1776  
1777  
1778  
1779  
1779  
1780  
1781  
1782  
1783  
1784  
1785  
1786  
1787  
1788  
1789  
1789  
1790  
1791  
1792  
1793  
1794  
1795  
1796  
1797  
1798  
1799  
1799  
1800  
1801  
1802  
1803  
1804  
1805  
1806  
1807  
1808  
1809  
1809  
1810  
1811  
1812  
1813  
1814  
1815  
1816  
1817  
1818  
1819  
1819  
1820  
1821  
1822  
1823  
1824  
1825  
1826  
1827  
1828  
1829  
1829  
1830  
1831  
1832  
1833  
1834  
1835  
1836  
1837  
1838  
1839  
1839  
1840  
1841  
1842  
1843  
1844  
1845  
1846  
1847  
1848  
1849  
1849  
1850  
1851  
1852  
1853  
1854  
1855  
1856  
1857  
1858  
1859  
1859  
1860  
1861  
1862  
1863  
1864  
1865  
1866  
1867  
1868  
1869  
1869  
1870  
1871  
1872  
1873  
1874  
1875  
1876
```

Creating Reports

Purchase Orders based on Suppliers:

The screenshot shows a Salesforce Lightning report titled "Purchase Orders based on Suppliers". The report interface includes a search bar, navigation tabs for Medical Inventory, Products, Purchase Orders, Order Items, Inventory Transactions, Suppliers, Reports (selected), and Dashboards. The main content area displays a summary table and a detailed table.

Summary Table:

Supplier ID	Purchase Order: Purchase Order Id	Total Order Cost
30	23	\$600.00
32	24	
Total		Record Count
		1
		1
		2

Detailed Table:

Purchase Order: ID	Actual Delivery Date	Expected Delivery Date	Order Date	Order Item	Purchase Order: Owner Name	Purchase Order: Owner Alias	Purchase Order: Owner Role	Purchase Order: Created E
a01gL00000L1A2t	9/10/2025	9/10/2025	9/7/2025	44	Selvambika M	sel	-	Selvambika M
a01gL00000L1HNk	9/11/2025	9/10/2025	9/8/2025	44	Selvambika M	sel	-	Selvambika M
3								

Report settings at the bottom include: Row Counts (checked), Detail Rows (checked), Subtotals (checked), Grand Total (checked), and Stacked Summaries (checked).

Complete Purchase Details Report:

The screenshot shows a Salesforce Lightning report titled "Complete Purchase Details Report". The report interface includes a search bar, navigation tabs for Medical Inventory, Products, Purchase Orders, Order Items, Inventory Transactions, Suppliers, Reports (selected), and Dashboards. The main content area displays a summary table and a detailed table.

Summary Table:

Total Records	Total Order Count	Total Quantity Received	Total Amount
2	2	40.00	\$600.00

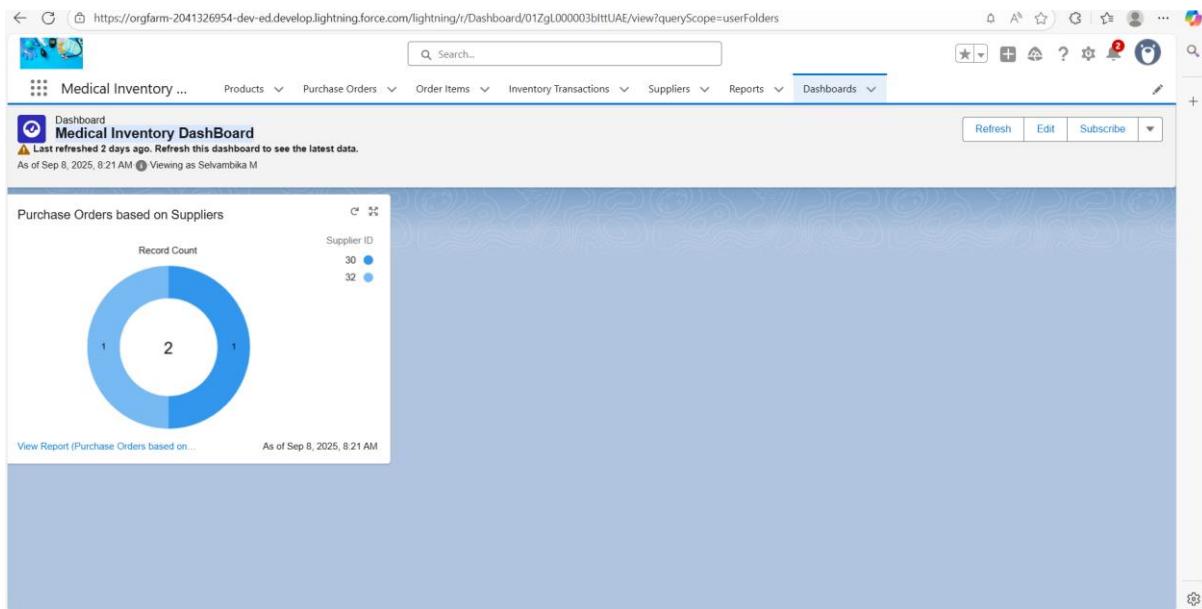
Detailed Table:

Supplier ID	Actual Delivery Date	Purchase Order: Purchase Order Id	Product: Product ID	Product: Product Name	Order Count	Quantity Received	Amount
30 (2)	9/10/2025 (2)	23 (2)	2pl	paracetamol	2	20.00	\$300.00
			3zb	zeebee	2	20.00	\$300.00
					2	40.00	\$600.00
					2	40.00	\$600.00
Subtotal							
Total (2)					2	40.00	\$600.00

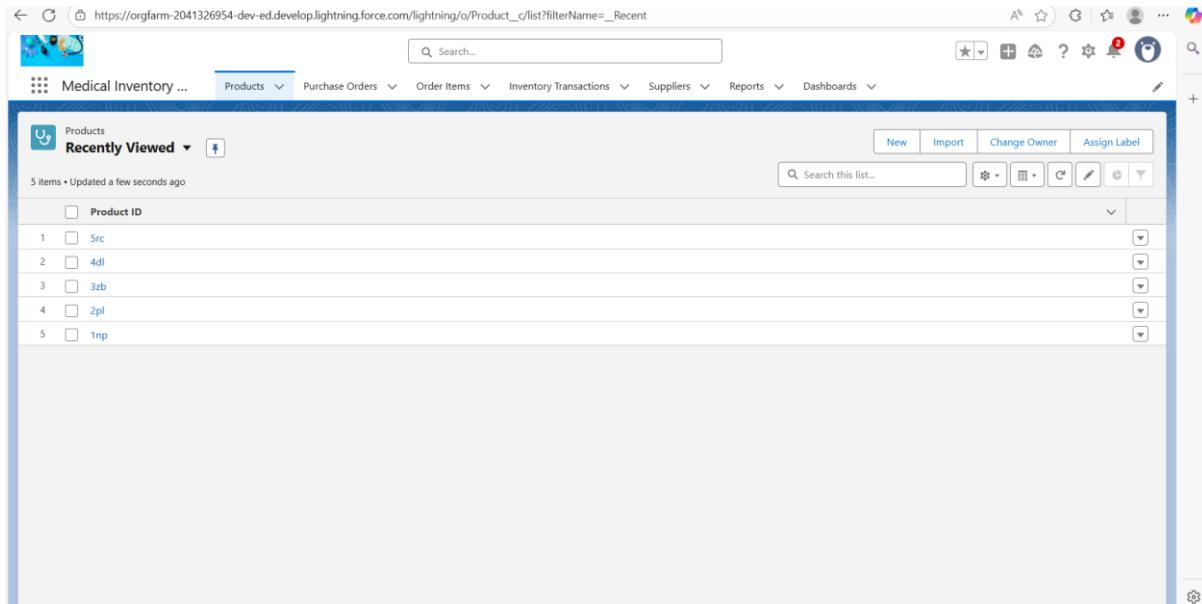
Report settings at the bottom include: Row Counts (checked), Detail Rows (checked), Subtotals (checked), Grand Total (checked), and Stacked Summaries (checked).

Creating Dashboards

Medical Inventory DashBoard:



Created Records:



https://orgfarm-2041326954-dev-ed.develop.lightning.force.com/lightning/o/Purchase_Order__c/list?filterName=_Recent

Purchase Orders
Recently Viewed ▾ +

5 items • Updated a few seconds ago

	Purchase Order Id
1	<input checked="" type="checkbox"/> 27
2	<input type="checkbox"/> 26
3	<input type="checkbox"/> 24
4	<input type="checkbox"/> 25
5	<input type="checkbox"/> 23

New Import Change Owner Assign Label

Search this list...

https://orgfarm-2041326954-dev-ed.develop.lightning.force.com/lightning/o/Purchase_Order__c/home

https://orgfarm-2041326954-dev-ed.develop.lightning.force.com/lightning/o/Order_Item__c/list?filterName=_Recent

Order Items
Recently Viewed ▾ +

5 items • Updated a few seconds ago

	Order Item Id
1	<input checked="" type="checkbox"/> 49
2	<input type="checkbox"/> 48
3	<input type="checkbox"/> 46
4	<input type="checkbox"/> 46
5	<input type="checkbox"/> 44

New Import Assign Label

Search this list...

https://orgfarm-2041326954-dev-ed.develop.lightning.force.com/lightning/o/Inventory_Transaction_c/list?filterName=_Recent

Inventory Transactions
Recently Viewed ▾

5 items • Updated a few seconds ago

<input type="checkbox"/> Inventory Transaction Id
1 <input type="checkbox"/> 14
2 <input type="checkbox"/> 13
3 <input type="checkbox"/> 12
4 <input type="checkbox"/> 11
5 <input type="checkbox"/> 10

New Import Assign Label

Search this list...

https://orgfarm-2041326954-dev-ed.develop.lightning.force.com/lightning/o/Supplier_c/list?filterName=_Recent

Suppliers
Recently Viewed ▾

5 items • Updated a few seconds ago

<input type="checkbox"/> Supplier Id
1 <input type="checkbox"/> 38
2 <input type="checkbox"/> 36
3 <input type="checkbox"/> 34
4 <input type="checkbox"/> 30
5 <input type="checkbox"/> 32

New Import Change Owner Assign Label

Search this list...

Viewing Records:

This screenshot shows a Product record for "paracetamol". The product ID is 2pl, the unit price is \$15.00, and the current stock level is 100. The owner is Selvambika M. The record was created by Selvambika M. on 9/8/2025, 7:23 AM, and last modified by her on 9/8/2025, 7:36 AM.

Field	Value
Product ID	2pl
Unit Price	\$15.00
Current Stock Level	100
Owner	Selvambika M.
Created By	Selvambika M., 9/8/2025, 7:23 AM
Last Modified By	Selvambika M., 9/8/2025, 7:36 AM

This screenshot shows a Purchase Order record for order number 26. The order date is 9/7/2025, the total order cost is \$450.00, and the supplier ID is 36. The actual delivery date is 9/10/2025, and there is one order item. The record was created by Selvambika M. on 9/12/2025, 8:51 AM, and last modified by her on 9/12/2025, 8:52 AM.

Field	Value
Order Date	9/7/2025
Total Order Cost	\$450.00
Supplier ID	36
Purchase Order Id	26
Actual Delivery Date	9/10/2025
Order Count	1
Total Order Cost	\$450.00
Owner	Selvambika M.
Created By	Selvambika M., 9/12/2025, 8:51 AM
Last Modified By	Selvambika M., 9/12/2025, 8:52 AM

https://orgfarm-2041326954-dev-ed.develop.lightning.force.com/lightning/r/Order_Item__c/a02gL000005oRuzQAE/view

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

Order Item 46

Related Details

Order Item Id
46 Purchase Order
24

Amount
\$300.00

Product
4dl

Unit Price
\$15.00

Created By
Selvambika M. 9/12/2025, 8:51 AM

Quantity Received
20.00

Last Modified By
Selvambika M. 9/12/2025, 8:51 AM

New Contact Edit New Opportunity

https://orgfarm-2041326954-dev-ed.develop.lightning.force.com/lightning/r/Inventory_Transaction__c/a03gL00000BxbzjQAB/view

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

Inventory Transaction 12

Related Details

Inventory Transaction Id
12 Purchase Order
26

Transaction Type
Receipt

Total Order Cost
\$450.00

Created By
Selvambika M. 9/12/2025, 8:53 AM

Last Modified By
Selvambika M. 9/12/2025, 8:53 AM

New Contact Edit New Opportunity

https://orgfarm-2041326954-dev-ed.develop.lightning.force.com/lightning/r/Supplier_c/a04gL000009gDgbQAM/view

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

Supplier 36

New Contact Edit New Opportunity

Related Details

Supplier Id 36	Phone Number (809) 223-4598
	Email varshan24@gmail.com
	Owner Selvambika M
Created By Selvambika M , 9/12/2025, 8:50 AM	Last Modified By Selvambika M , 9/12/2025, 8:50 AM

https://orgfarm-2041326954-dev-ed.develop.lightning.force.com/lightning/r/Product_c/a00gL00000lx4OcQAI/view

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

Product dolo 650

New Contact Edit New Opportunity

Unit Price
\$15.00 Current Stock Level
200

Related Details

Product ID 4dl	Unit Price \$15.00
Product Name dolo 650	Current Stock Level 200
Product Description	Owner Selvambika M
Created By Selvambika M , 9/12/2025, 8:45 AM	Last Modified By Selvambika M , 9/12/2025, 8:45 AM

This screenshot shows the Purchase Order detail page in the Medical Inventory Management CRM. The URL is https://orgfarm-2041326954-dev-ed.develop.lightning.force.com/lightning/r/Purchase_Order__c/a01gJ00000L1HNkQAN/view. The page displays a Purchase Order with ID 24, created by Selvambika M. on 9/8/2025 at 7:45 AM. The total order cost is \$300.00, and it is supplied by Supplier ID 32. The order has one item, with an actual delivery date of 9/11/2025. The Order Item details show an Order Item ID of 44, a quantity of 20.00, and a unit price of \$15.00.

This screenshot shows the Order Item detail page in the Medical Inventory Management CRM. The URL is https://orgfarm-2041326954-dev-ed.develop.lightning.force.com/lightning/r/Order_Item__c/a02gJ000005gEjdQAE/view. The page displays an Order Item with ID 44, created by Selvambika M. on 9/8/2025 at 7:34 AM. It is associated with Purchase Order 23 and has a quantity received of 20.00.

CONCLUSION

The Medical Inventory Management CRM has successfully centralized and automated medical supply tracking, purchase order management, and supplier coordination. It reduces manual effort, ensures timely stock replenishment, and supports compliance with audit requirements. With its current setup and planned AI/chatbot integrations, the system will continue to grow as a comprehensive, intelligent healthcare inventory solution.