

# **PROJECT TITLE**

**College Name:** DR. RV ARTS AND SCIENCE COLLEGE KARAMADAI

**College Code:** Asbru5

**TEAM ID:** NM2025TMID27650

## **TEAM MEMBERS:**

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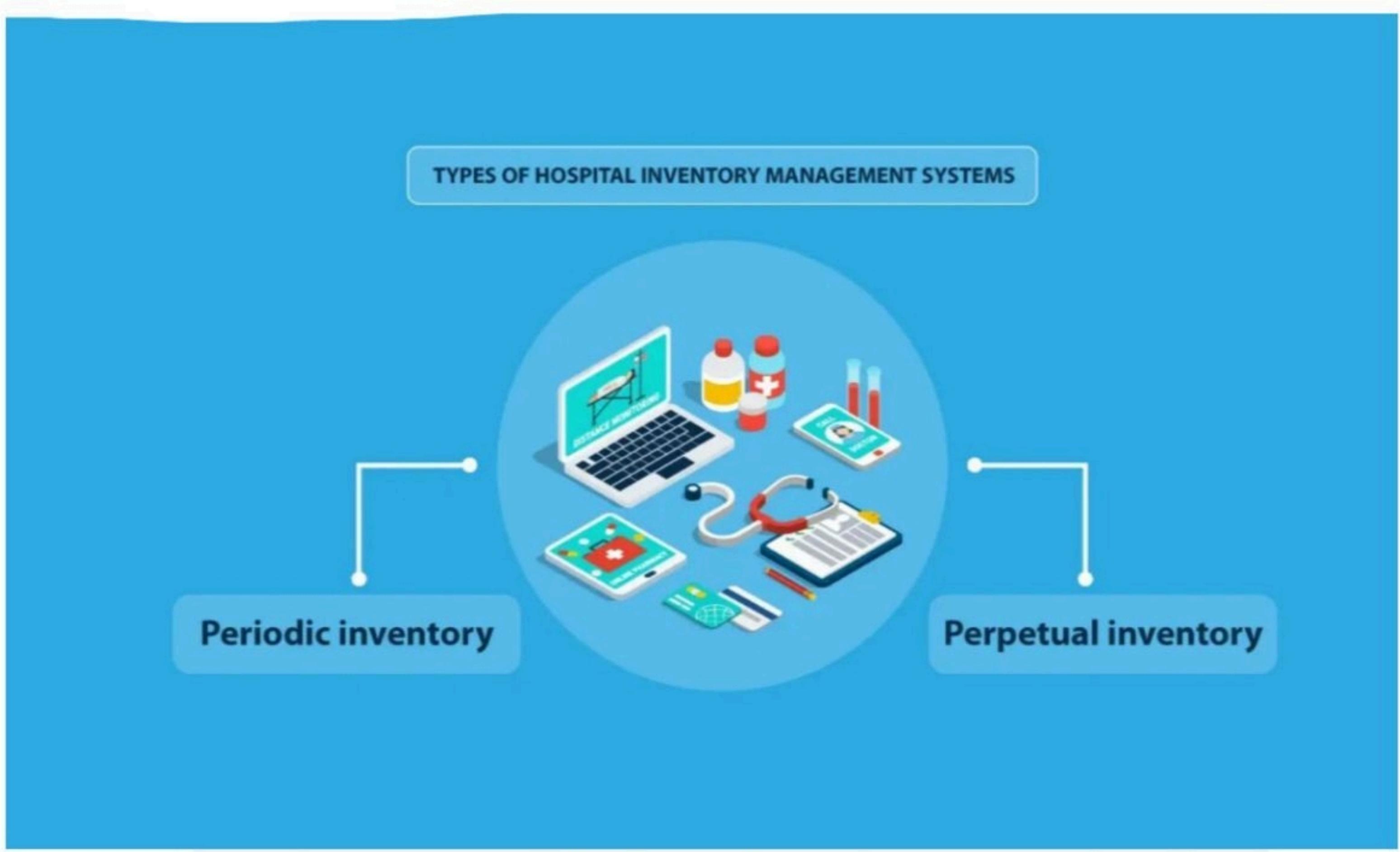
**Email:** sharutaebts@gmail.com

**Team Member:** SHRUTHI. S

## **1.INTRODUCTION**

### **1.1 Project Overview**

This project is a comprehensive Salesforce application to streamline and manage various operational aspects of medical inventory.

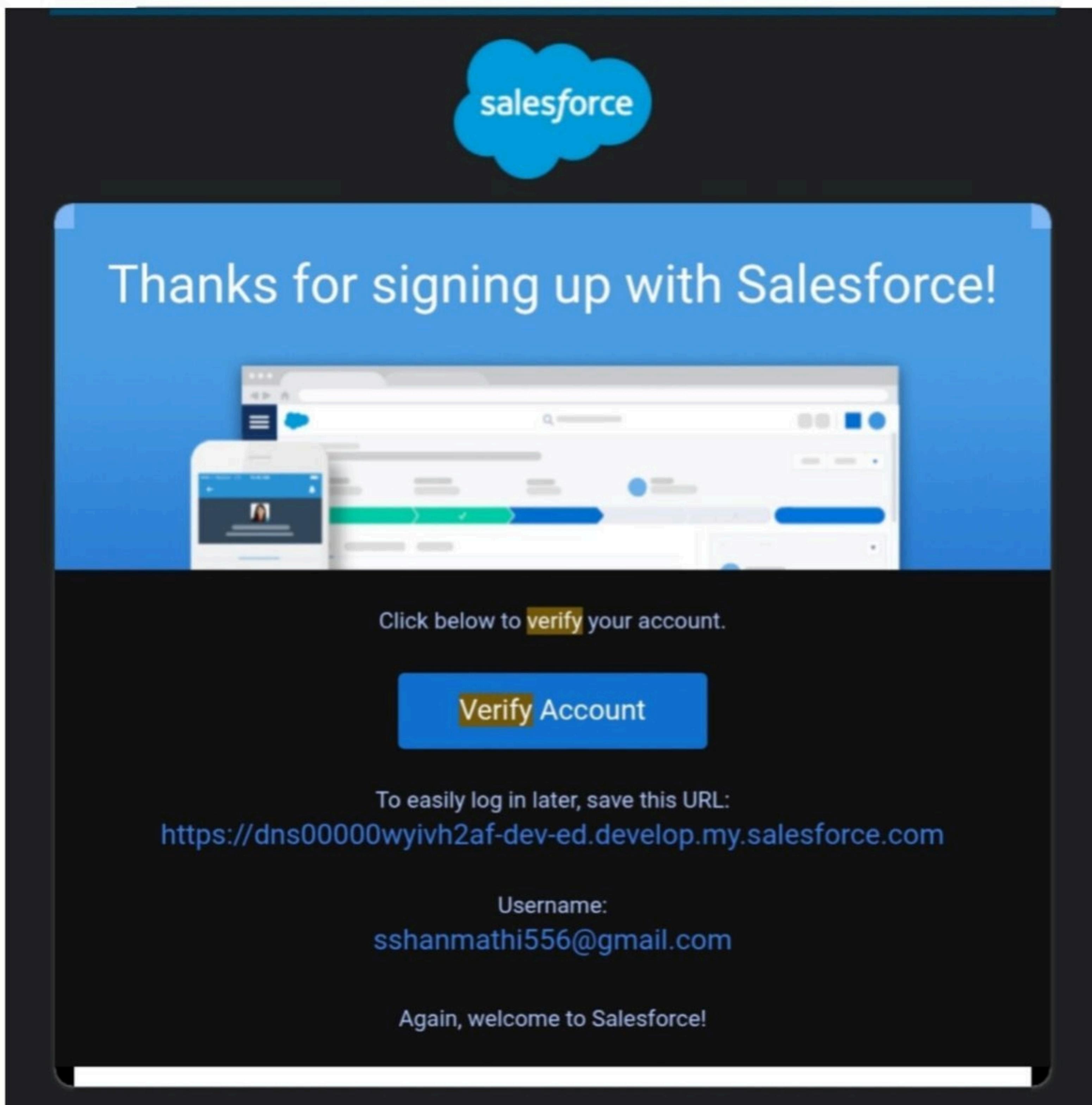


## 1.2 Purpose

The Medical Inventory Management System is a comprehensive Salesforce application designed to streamline and manage various operational aspects of the medical inventory. It can efficiently maintain supplier details, manage purchase orders, track product details and transactions, and monitor expiry dates of products, thereby improving operational efficiency, data accuracy, and reporting capabilities.

# Activity 1: Creating Developer Account

Creating a developer org in salesforce.  
Activity 2: Account Activation



Verifying Account

# Creating A Product Object

The image displays two screenshots of the Salesforce Setup Home page. The top screenshot shows the main landing page with various setup options like Einstein Bots, Mobile Publisher, and Trailblazer Community. The bottom screenshot shows the 'New Custom Object' configuration page.

**Setup Home Screenshot:**

- Left sidebar: Setup, Home, Object Manager, Quick Find, Setup Home, Salesforce Go, Service Setup Assistant, Commerce Setup Assistant, Field Service Setup Home (Beta), Hyperforce Assistant, Release Updates, Salesforce Mobile App, Lightning Usage, Optimizer, Sales Cloud Everywhere.
- Right sidebar: Administration, Users, Permission Set Groups, Permission Sets, Profiles, Public Groups.
- Main content: Get Started with Einstein Bots, Mobile Publisher, Join the Trailblazer Community.

**New Custom Object Screenshot:**

**Custom Object Definition Edit - New Custom Object**

**Custom Object Information:**

- Label: Product (Example: Account)
- Plural Label: Products (Example: Accounts)
- Items with visual record: Products
- Object Name: Product (Example: Account)

**Description:** (Empty text area)

**Context Sensitive Help Setting:**

- Open the standard Salesforce.com Help & Training window
- Open a window using a Visualforce page

**Content Name:** Product

Setup > Object Manager

## Productt

**Details**

Fields & Relationships	Description
Page Layouts	API Name: Productt_c
Lightning Record Pages	Custom
Buttons, Links, and Actions	Singular Label: Productt
Compact Layouts	Plural Label: Productt
Field Sets	Enable Reports: ✓
Object Limits	Track Activities: ✓
Record Types	Track Field History: ✓
Related Lookup Filters	Deployment Status: Deployed
Search Layouts	Help Settings: Standard salesforce.com Help Window
List View Button Layout	
Restriction Rules	
Scoping Rules	

**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

**Actions**

[Edit](#) [Delete](#)

Setup > Object Manager

## Object Manager

5 items. Sorted by Label

Label	API Name	Type	Description	Last Modified	Deployed
Fulfillment Order Item Adjustment	FulfillmentOrderItemAdjustment	Standard Object			
Fulfillment Order Item Tax	FulfillmentOrderItemTax	Standard Object			
Order Item	Order_Item_c	Custom Object		8/28/2025	✓
Return Order Item Adjustment	ReturnOrderItemAdjustment	Standard Object			
Return Order Item Tax	ReturnOrderItemTax	Standard Object			

## New Custom Object Tab

### Step 1. Enter the Details

Choose the custom object for this new custom tab. Fill in other details.

#### New Custom Object Tab

Select an existing custom object or [create a new custom object now](#).

Object

Tab Style



(Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab.

Splash Page Custom Link

Enter a short description.

Description



Labels

Looking for?

#### Custom Object Tabs

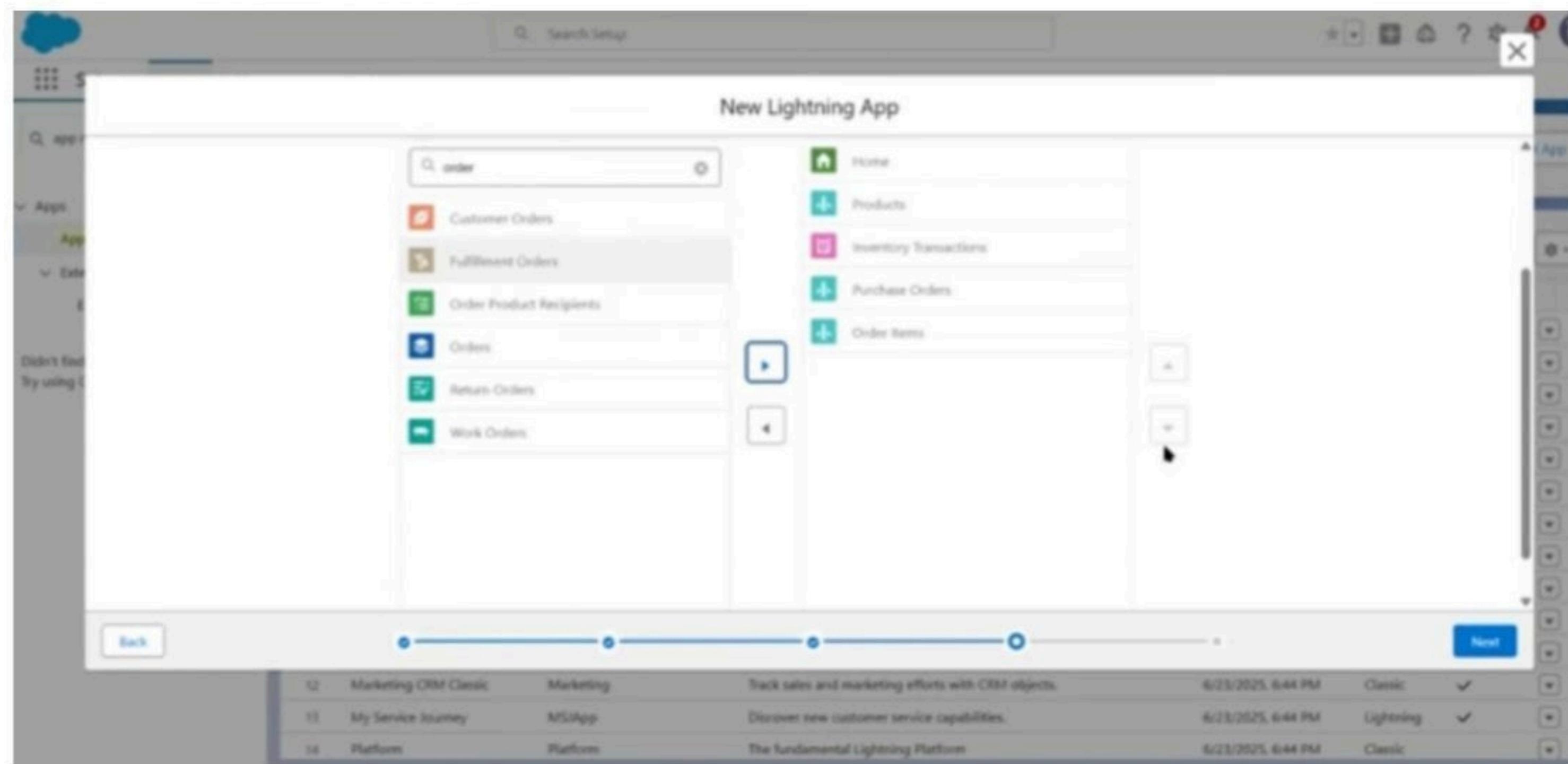
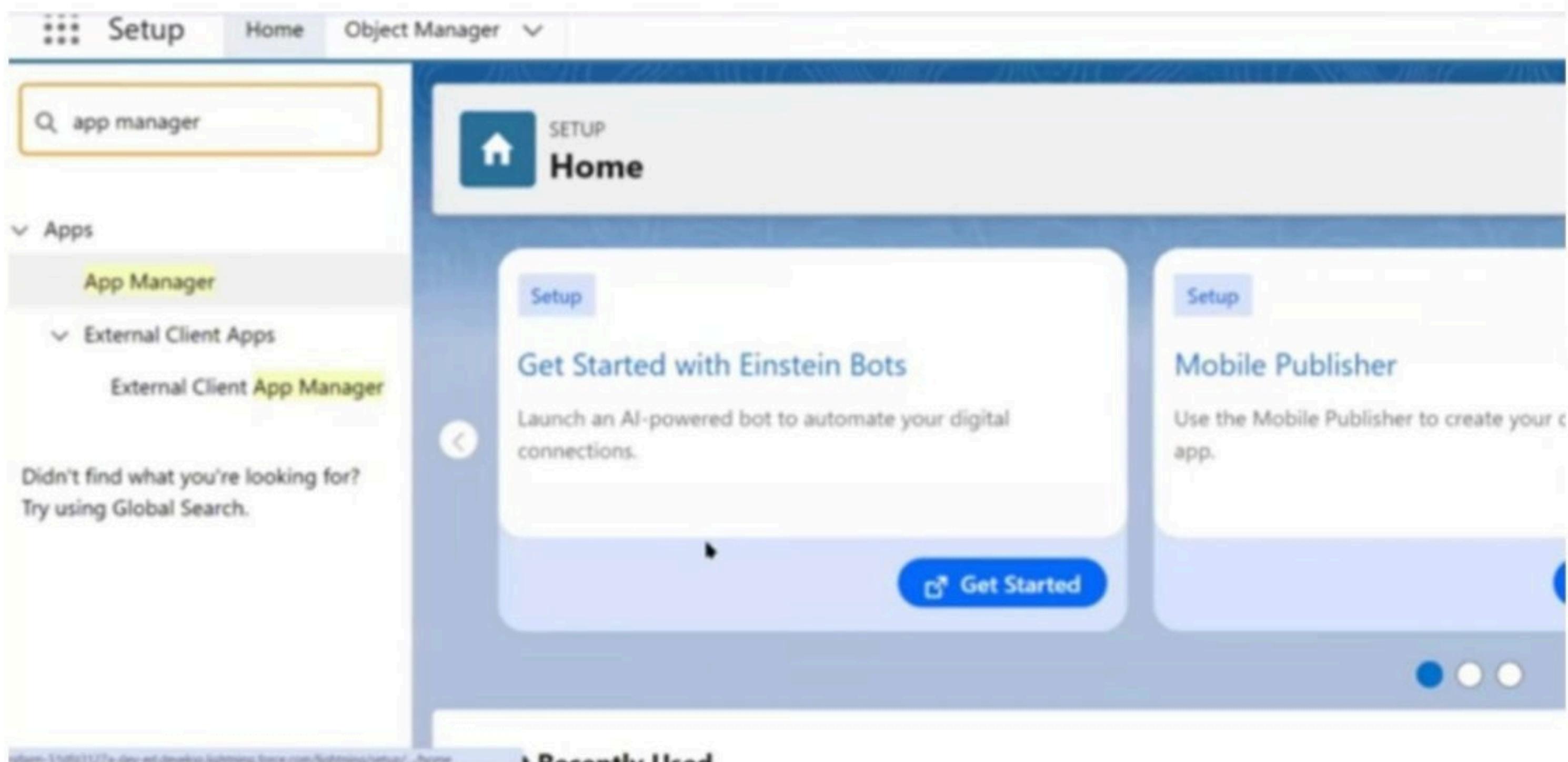
[New](#) [What Is This?](#)

Action	Label	Tab Style
<a href="#">Edit</a>   <a href="#">Del</a>	Billing	Balls
<a href="#">Edit</a>   <a href="#">Del</a>	Customer Orders	Balls
<a href="#">Edit</a>   <a href="#">Del</a>	Inventory Transactions	Alarm clock
<a href="#">Edit</a>   <a href="#">Del</a>	Items	Boat
<a href="#">Edit</a>   <a href="#">Del</a>	Jewel Customers	Apple
<a href="#">Edit</a>   <a href="#">Del</a>	Order Items	Airplane
<a href="#">Edit</a>   <a href="#">Del</a>	Prices	Balls
<a href="#">Edit</a>   <a href="#">Del</a>	Products	Airplane
<a href="#">Edit</a>   <a href="#">Del</a>	Product	Bell
<a href="#">Edit</a>   <a href="#">Del</a>	Purchase Orders	Airplane
<a href="#">Edit</a>   <a href="#">Del</a>	Suppliers	Alarm clock

#### Web Tabs

[New](#) [What Is This?](#)

# Create A Lightning App For Medical Inventory Management



Setup Home Object Manager

SETUP > OBJECT MANAGER Product

Details Fields & Relationships

10 items, Sorted by Field Label

FIELD LABEL FIELD NAME DATA TYPE CONTROLLING FIELD INDEXED

Created By	CreatedById	Lookup(User)		
Current Stock Level	Current\_Stock\_Level\_\_c	Number(18, 0)		
Expiry Date	Expiry\_Date\_\_c	Date		
Last Modified By	LastModifiedById	Lookup(User)		
Minimum Stock Level	Minimum\_Stock\_Level\_\_c	Number(18, 0)		
Owner	OwnerId	Lookup(User, Group)		✓
Product Description	Product\_Description\_\_c	Text Area(255)		
Product ID	Name	Text(30)		✓
Product Name	Product\_Name\_\_c	Text(10)		
Unit Price	Unit\_Price\_\_c	Currency(14, 2)		

Setup Home Object Manager

SETUP > OBJECT MANAGER Product

Details Fields & Relationships Page Layouts

Save Quick Save Preview As... Cancel Layout Properties

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

Quick Find Field Name

Section	Field	Description
Standard	Expiry Date	Product Description
Standard	Last Modified By	Product ID
Standard	Created By	Minimum Stock Level
Standard	Current Stock Level	Product Name
Standard	Owner	Unit Price

Information [Header visible on edit only]

Product ID	Sample Text
Product Name	Sample Text
Product Description	Sample Text
Minimum Stock Level	14,825
Current Stock Level	72,876
Unit Price	\$123.45
Expiry Date	8/28/2025

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)

Setup Home Object Manager

SETUP > OBJECT MANAGER Product

Details Fields & Relationships Page Layouts Lightning Record Pages Buttons, Links, and Actions Compact Layouts Field Sets Object Limits Record Types Related Lookup Filters Search Layouts List View Button Layout Restriction Rules Mobile Cards (Salesforce mobile only)

Save Quick Save Preview As... Cancel Undo ⌘ F10 Layout Properties

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

Quick Find: Product Name

Copy Date Last Modified By Minimum Stock Level Owner Product Description Product ID Product Name Unit Price

Product Detail

Information (Visible in classic with only) Product ID Sample Text Product Name Sample Text Product Description Sample Text

Systonic information (Visible in classic with only) Created By Sample Text Last Modified By Sample Text

Custom Buttons

Sharing Hierarchy Edit Labels

Product Name Read-Only Required

OK Cancel

Owner Sample Text

http://**username:S1893127a**.dev-ed.develop.my.salesforce.com/layoutsedit/LayoutEdit.htm#...

Setup Home Object Manager

SETUP > OBJECT MANAGER Product

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

Help for this Page

Product Compact Layouts New 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

1 Required Information

Label: Product Compact Layout  
Name: Product\_Compact\_Layout

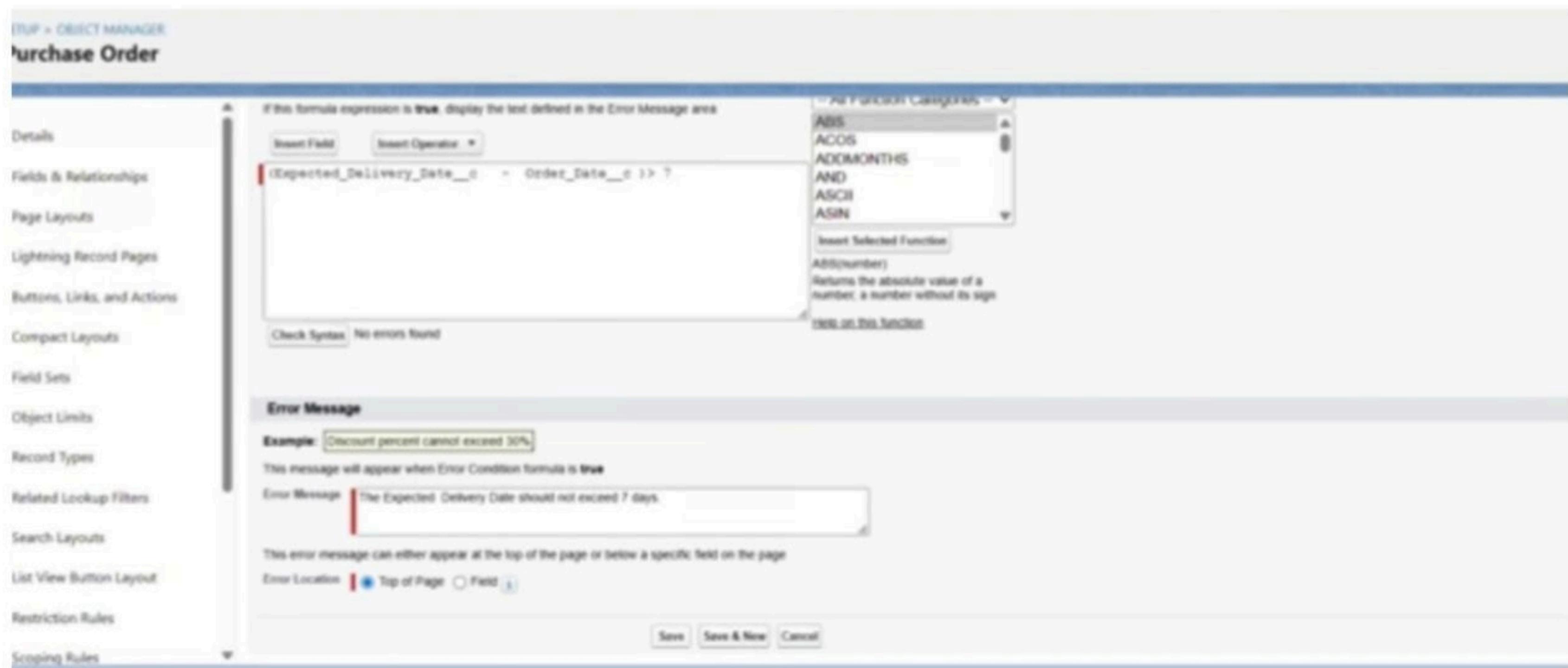
Select Compact Layout Fields

Available Fields: Created By, Expiry Date, Last Modified By, Minimum Stock Level, Owner, Product ID  
Selected Fields: Product Name, Unit Price, Current Stock Level

Add Up Remove Down Bottom

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

# Creating A Unit Price Formula Field In Order Item Object



# Edit A Page Layout In Product Object

SETUP > OBJECT MANAGER  
**Product**

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

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

**Fields** Quick Field Field Name

Sections	Expiry Date	Product Description
Blank Space	Last Modified By	Product ID
Created By	Minimum Stock Level	Product Name
Current Stock Level	Owner	Unit Price

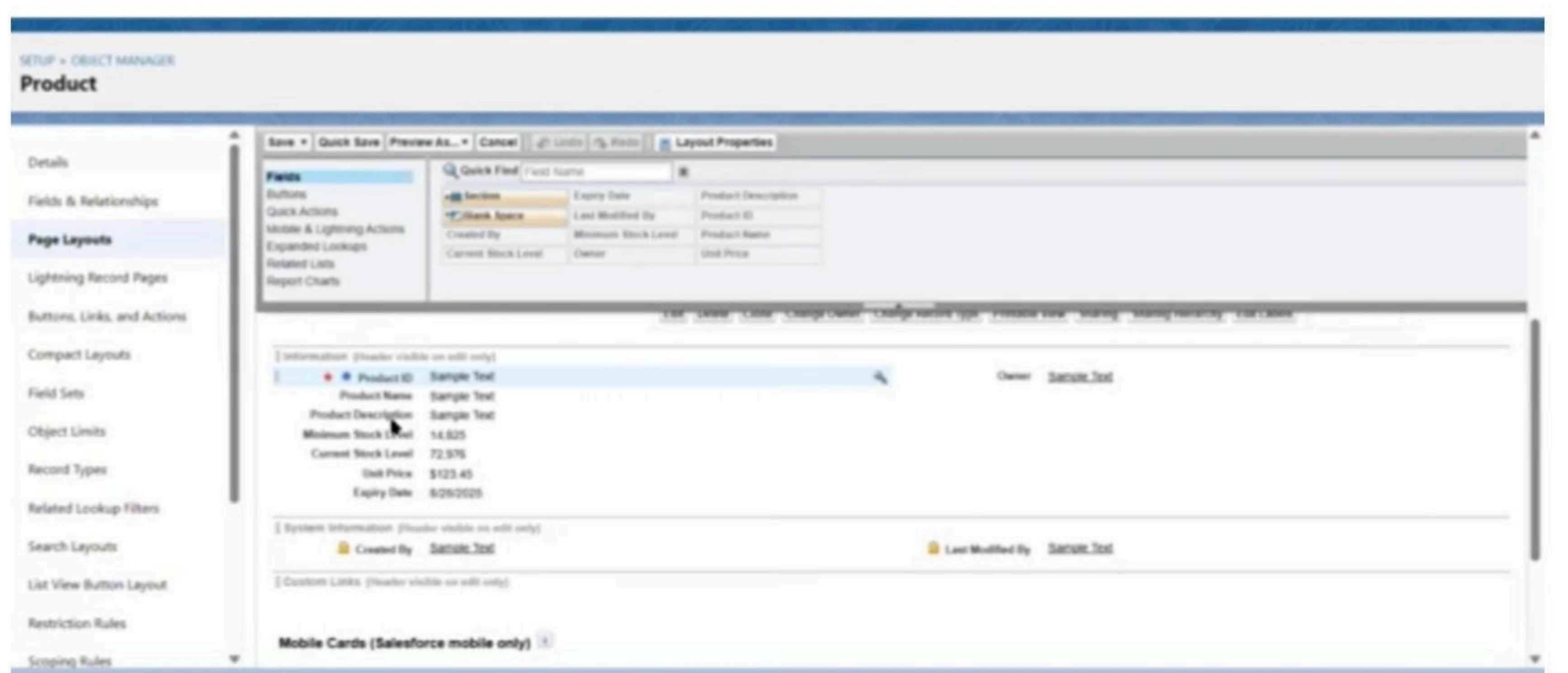
Information (header visible on edit only)  
Product ID: Sample Test  
Product Name: Sample Test  
Product Description: Sample Test  
Minimum Stock Level: 14.825  
Current Stock Level: 72.975  
Unit Price: \$123.45  
Expiry Date: 6/26/2025

Owner: Sample.Test

System Information (header visible on edit only)  
Created By: Sample.Test Last Modified By: Sample.Test

Custom Links (header visible on edit only)

Mobile Cards (Salesforce mobile only)



SETUP > OBJECT MANAGER  
**Product**

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

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

**Fields** Quick Field Field Name

Sections	Expiry Date	Product Description
Blank Space	Last Modified By	Product ID
Created By	Minimum Stock Level	Product Name
Current Stock Level	Owner	Unit Price

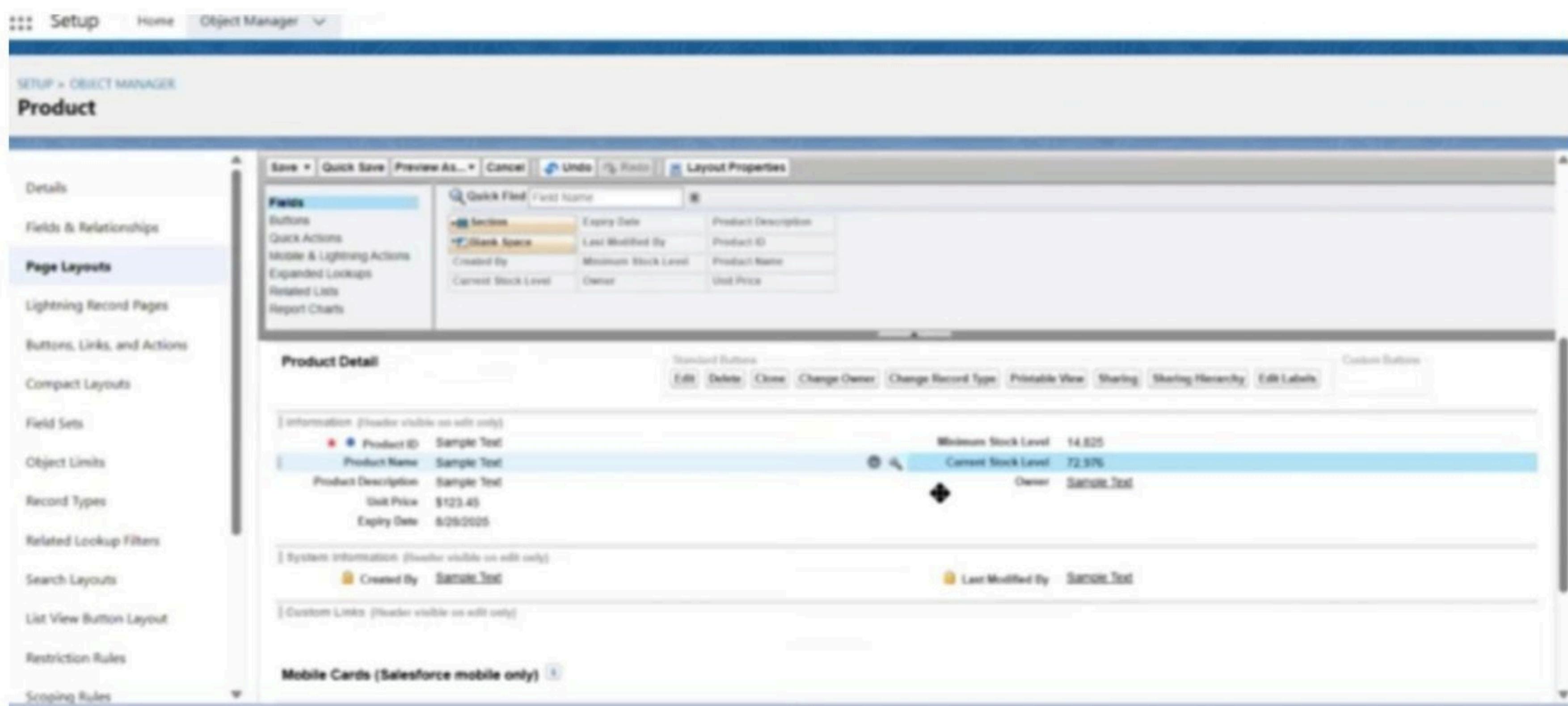
**Product Detail** Standard Buttons Edit Delete Close Change Owner Change Record Type Printable View Sharing Sharing Hierarchy Edit Labels Custom Buttons

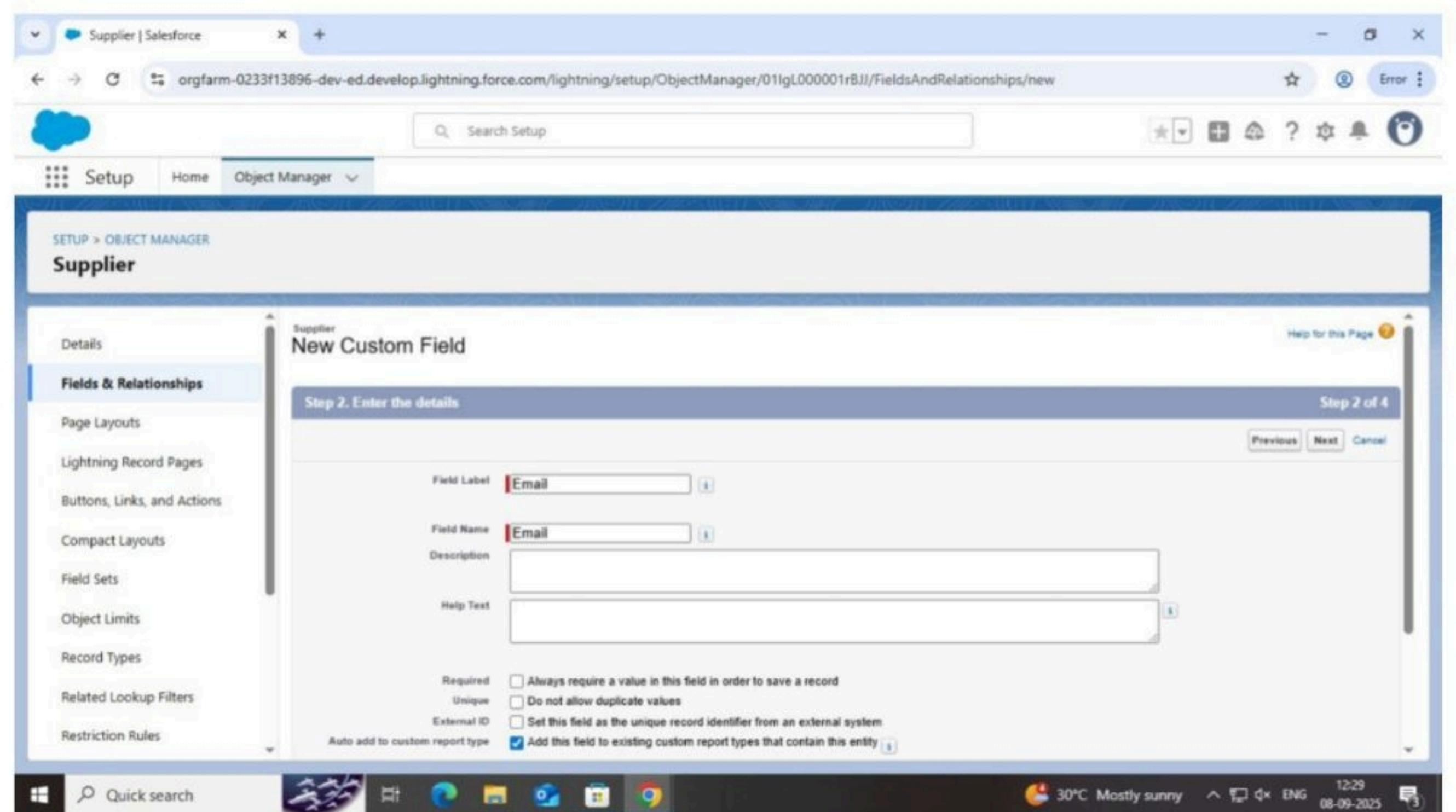
Information (header visible on edit only)  
Product ID: Sample Test Minimum Stock Level: 14.825  
Product Name: Sample Test Current Stock Level: 72.975  
Product Description: Sample Test Owner: Sample.Test  
Unit Price: \$123.45 Expiry Date: 6/26/2025

System Information (header visible on edit only)  
Created By: Sample.Test Last Modified By: Sample.Test

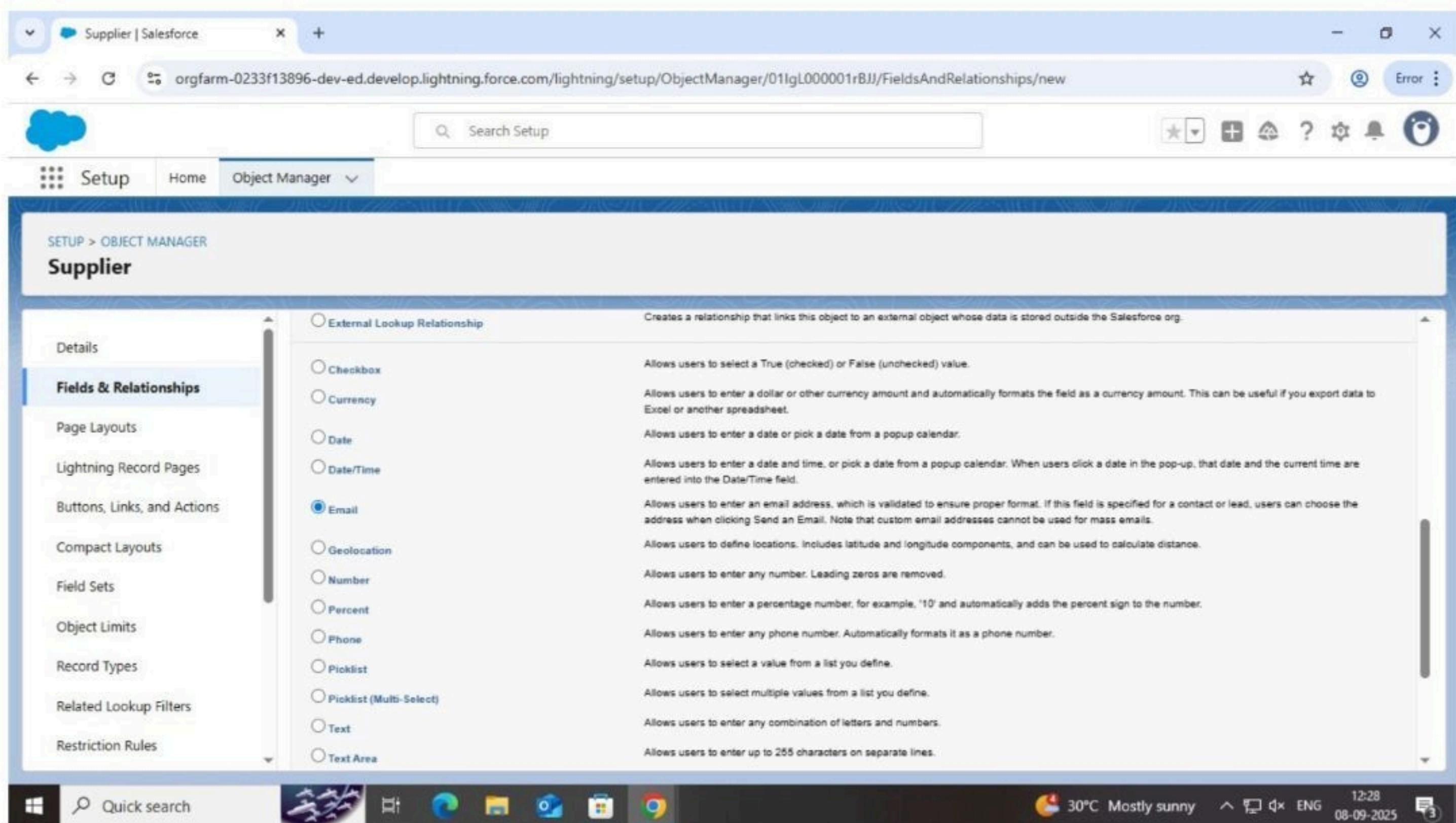
Custom Links (header visible on edit only)

Mobile Cards (Salesforce mobile only)





## Creating A Email Field In Supplier Object



# Edit A Page Layout In Product Object

SETUP > OBJECT MANAGER  
**Product**

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

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

**Fields** Quick Field Field Name

Sections	Expiry Date	Product Description
Blank Space	Last Modified By	Product ID
Created By	Minimum Stock Level	Product Name
Current Stock Level	Owner	Unit Price

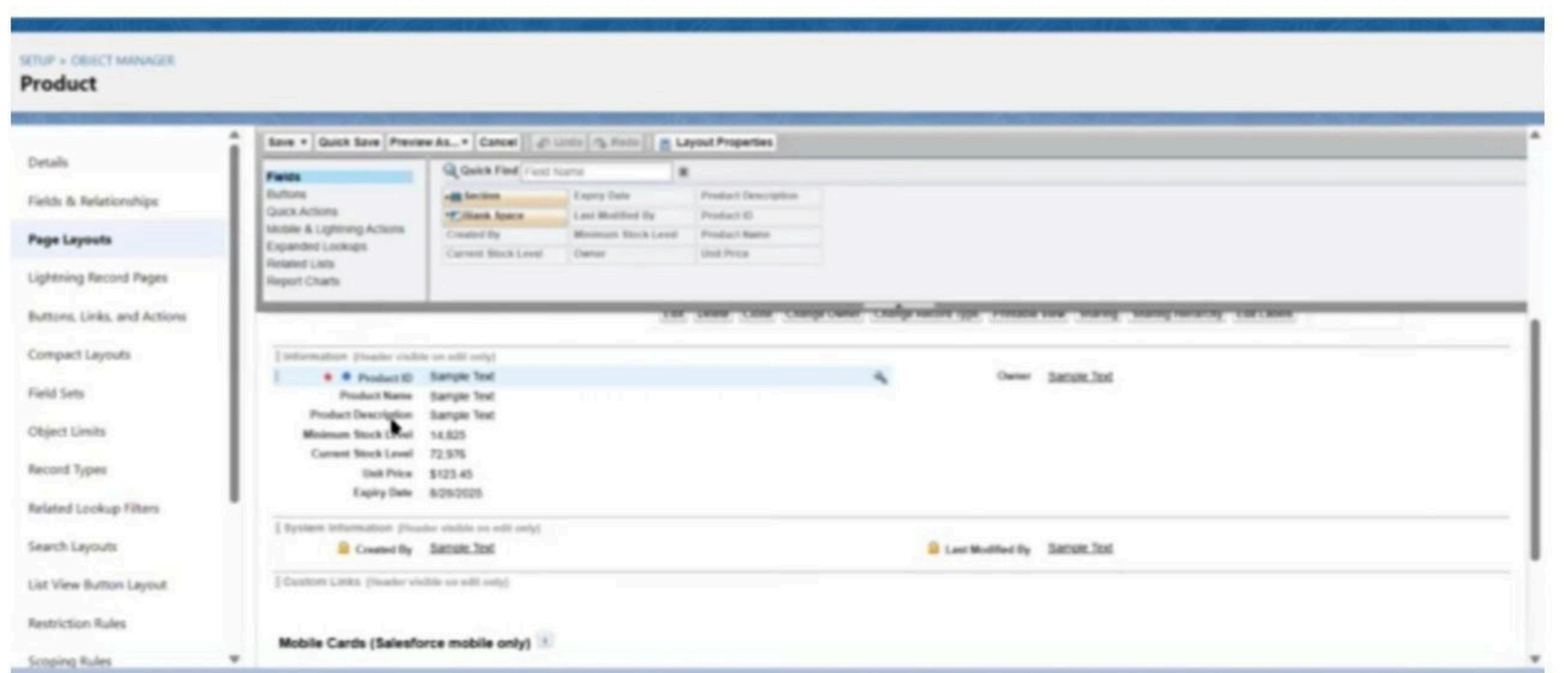
Information (header visible on edit only)  
Product ID: Sample Test  
Product Name: Sample Test  
Product Description: Sample Test  
Minimum Stock Level: 14.825  
Current Stock Level: 72.375  
Unit Price: \$123.45  
Expiry Date: 6/26/2025

Owner: Sample.Test

System Information (header visible on edit only)  
Created By: Sample.Test Last Modified By: Sample.Test

Custom Links (header visible on edit only)

Mobile Cards (Salesforce mobile only)



SETUP > OBJECT MANAGER  
**Product**

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

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

**Fields** Quick Field Field Name

Sections	Expiry Date	Product Description
Blank Space	Last Modified By	Product ID
Created By	Minimum Stock Level	Product Name
Current Stock Level	Owner	Unit Price

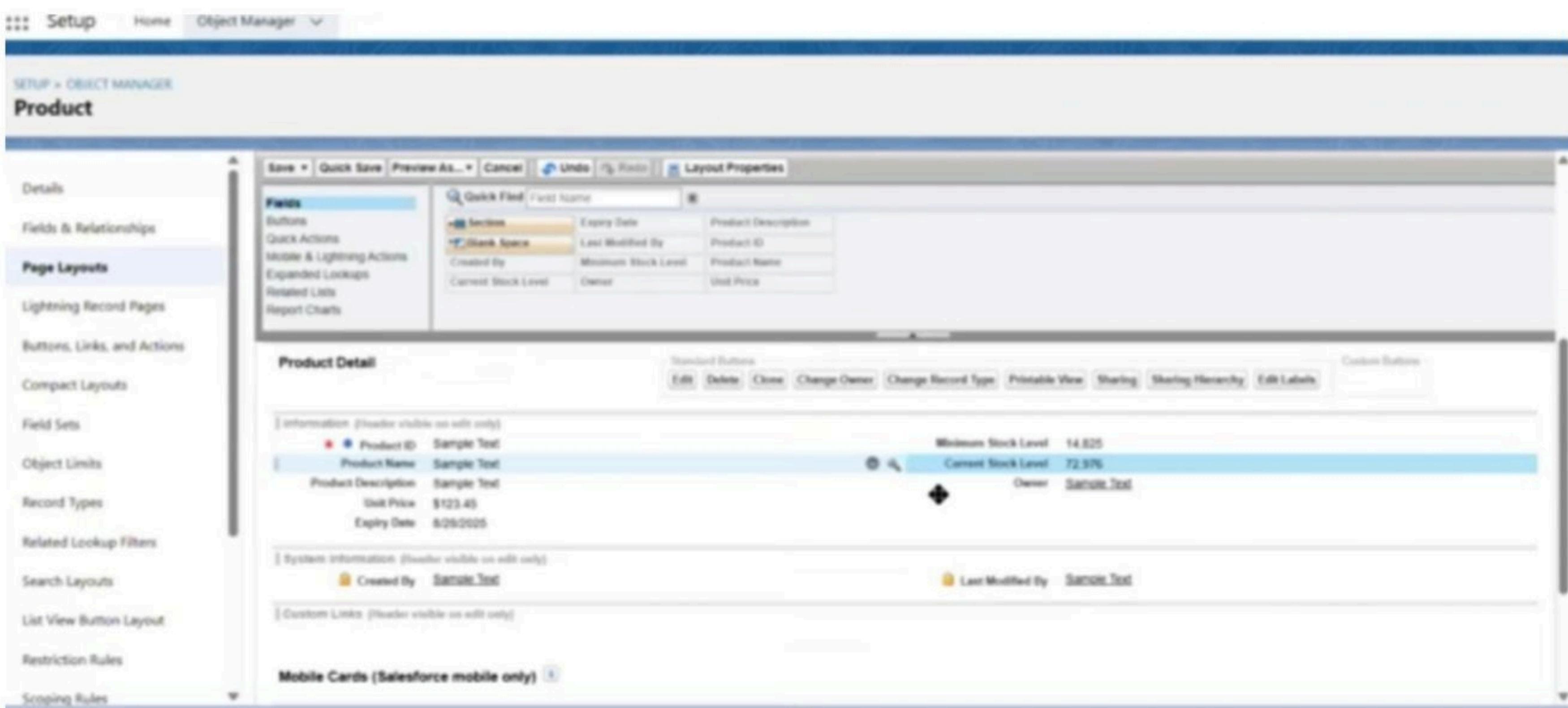
**Product Detail** Standard Buttons Edit Delete Close Change Owner Change Record Type Printable View Sharing Sharing Hierarchy Edit Labels Custom Buttons

Information (header visible on edit only)  
Product ID: Sample Test Minimum Stock Level: 14.825  
Product Name: Sample Test Current Stock Level: 72.375  
Product Description: Sample Test Owner: Sample.Test  
Unit Price: \$123.45 Expiry Date: 6/26/2025

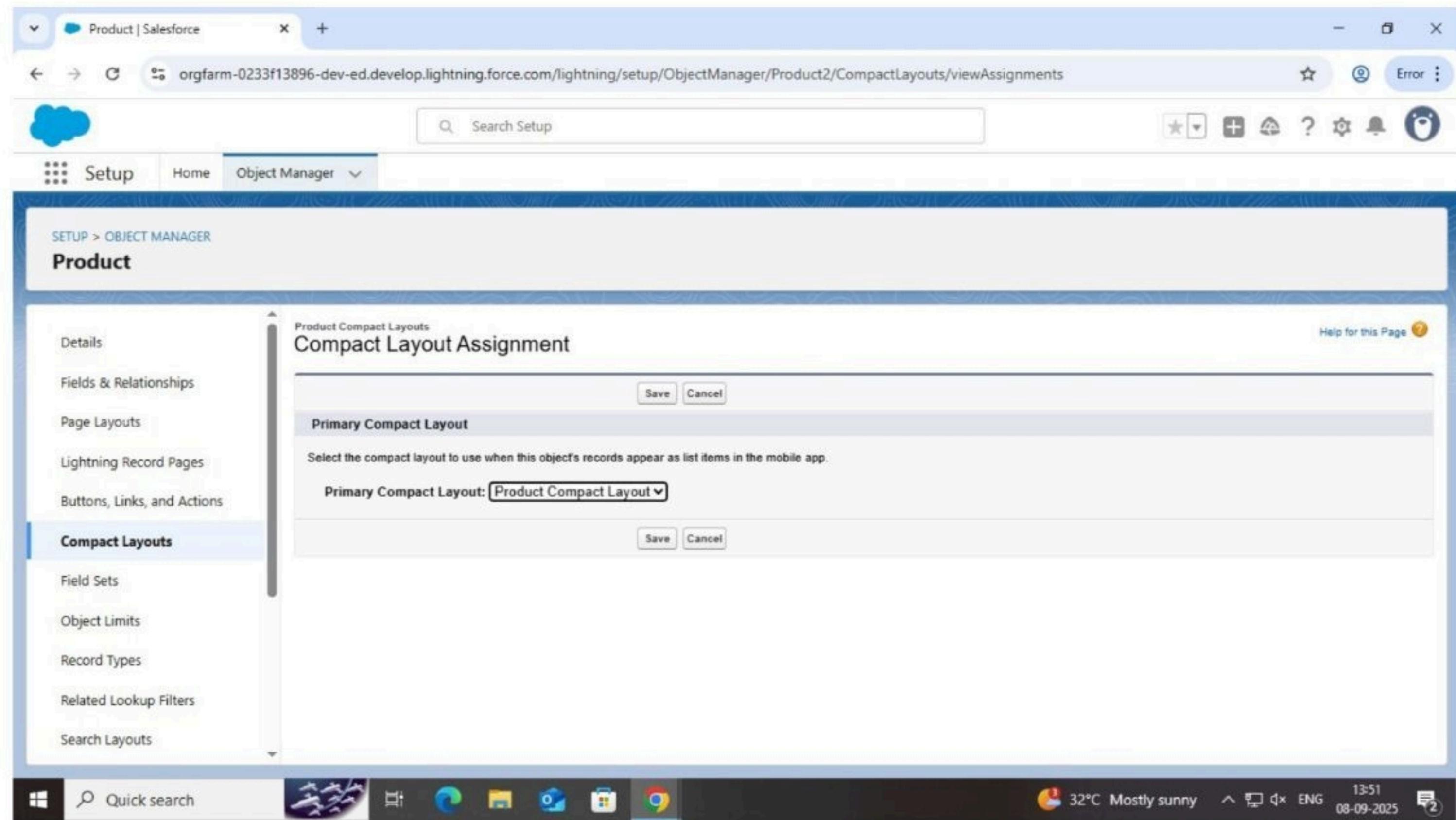
System Information (header visible on edit only)  
Created By: Sample.Test Last Modified By: Sample.Test

Custom Links (header visible on edit only)

Mobile Cards (Salesforce mobile only)



# Create A Compact Layout To A Product Object



Product | Salesforce

orgfarm-0233f13896-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/Product2/CompactLayouts/0AHgL000000EQc9/view

Setup Home Object Manager

SETUP > OBJECT MANAGER  
Product

Product Compact Layout  
Product Compact Layout

< Back to Product Compact Layouts

Compact Layout Detail

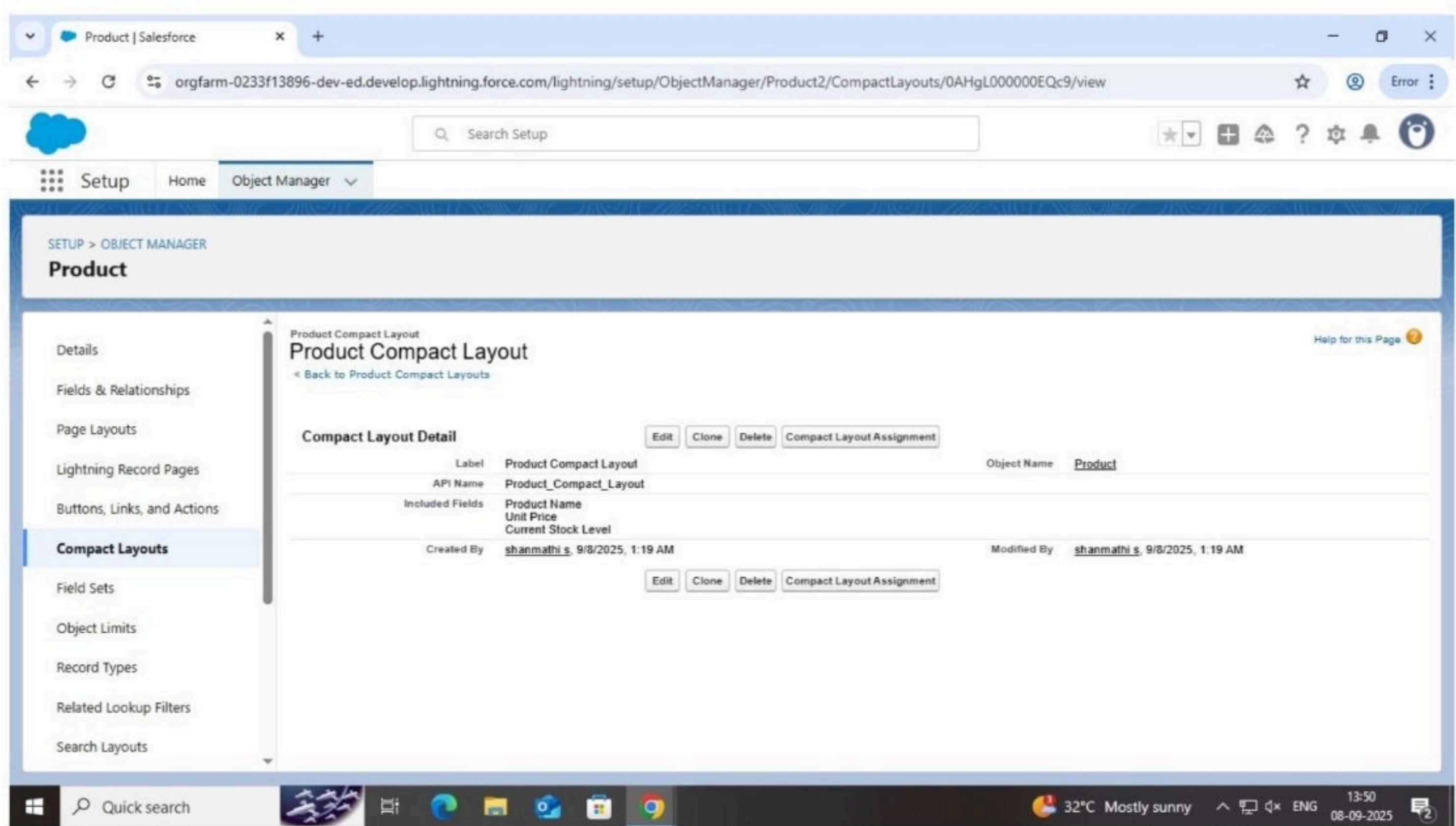
Label	Product Compact Layout	Object Name	Product
API Name	Product_Compact_Layout		
Included Fields	Product Name Unit Price Current Stock Level		
Created By	shanmathi.s, 9/8/2025, 1:19 AM	Modified By	shanmathi.s, 9/8/2025, 1:19 AM

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

Quick search

32°C Mostly sunny 13:50 08-09-2025



Product | Salesforce

orgfarm-0233f13896-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/Product2/CompactLayouts/new

Setup Home Object Manager

SETUP > OBJECT MANAGER  
Product

Compact Layout Edit

Enter Compact Layout Information

Required Information

Label	Product Compact Layout
Name	Product_Compact_Layout

Select Compact Layout Fields

Available Fields	Selected Fields
Active Created By Display URL External Data Source External ID Last Modified By Product Class Product Code Product Family Product Name	Product Name Unit Price <b>Current Stock Level</b>

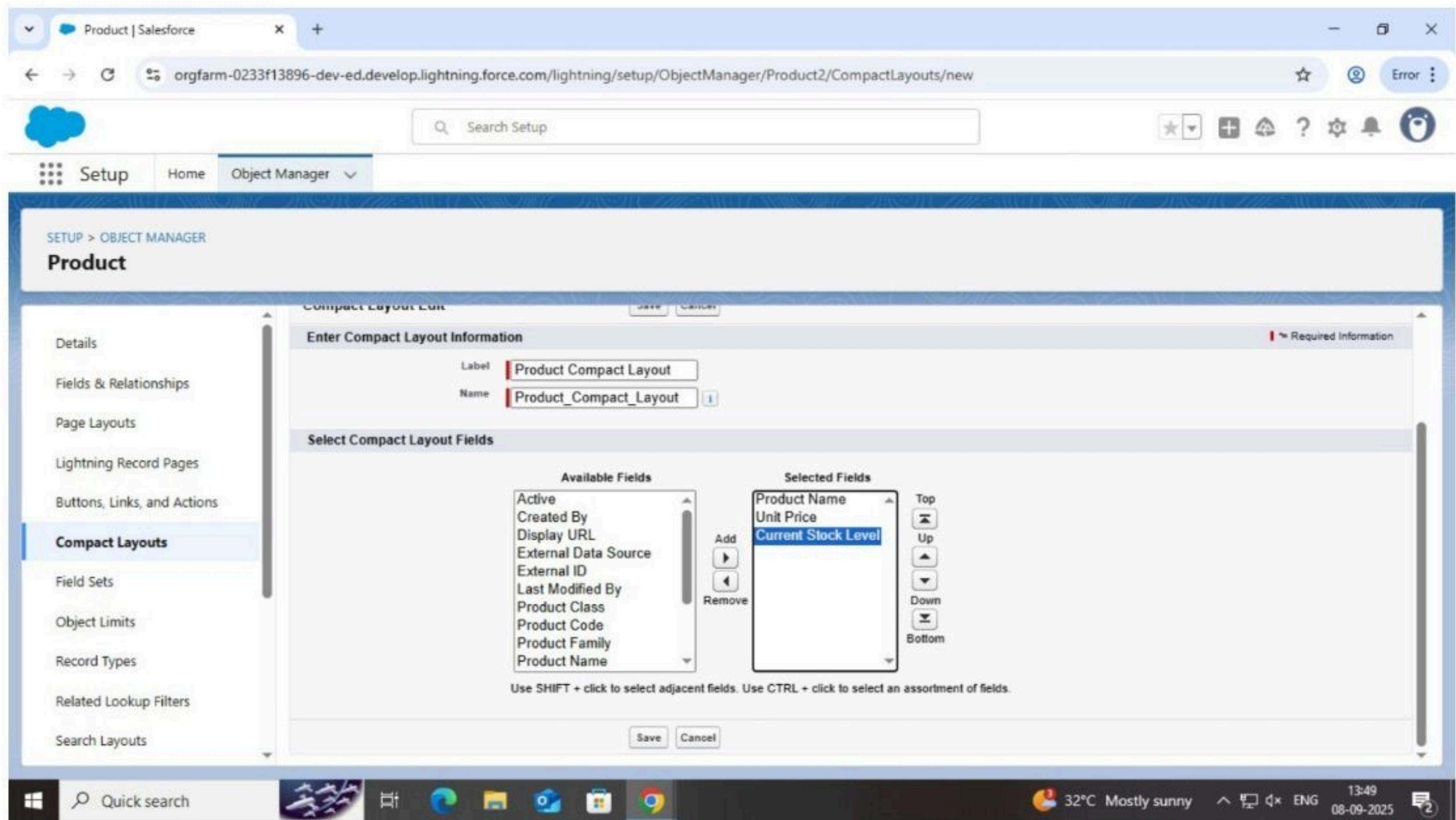
Add Remove Top Up Down Bottom

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

Save Cancel

Quick search

32°C Mostly sunny 13:49 08-09-2025



Product | Salesforce

orgfarm-0233f13896-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/Product2/CompactLayouts/new

Setup Home Object Manager

SETUP > OBJECT MANAGER

## Product

CompactLayouts

Enter Compact Layout Information

Label: Product Compact Layout  
Name: Product\_Compact\_Layout

Select Compact Layout Fields

Available Fields: Active, Created By, Display URL, External Data Source, External ID, Last Modified By, Product Class, Product Code, Product Family, Product Name

Selected Fields: Product Name, Unit Price, Current Stock Level

Add Remove Top Up Down Bottom

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

Save Cancel

Quick search 32°C Mostly sunny 13:49 08-09-2025

Inventory Transaction | Salesforce

orgfarm-0233f13896-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IgL000001rBHh/PageLayouts/00hgL000006WWxNQAW/view

Setup Home Object Manager

SETUP > OBJECT MANAGER

## Inventory Transaction

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Restriction Rules

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

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

Quick Find: Field Name

Section, Blank Space, Last Modified By, Owner, Transaction Type, Created By, Inventory Transac...

Publisher: Actions in this section are currently inherited from the global publisher layout. You can override the global publisher layout to set a customized list of actions for the publisher on pages that use this layout.

Salesforce Mobile and Lightning Experience: Actions

Actions in this section are predefined by Salesforce. You can override the predefined actions to set a customized list of actions on Lightning Experience and mobile app pages that use this layout. If you customize the actions in the Quick Actions in the Salesforce Classic Publisher section, and have saved the layout, then this section inherits that set of actions by default when you click to override.

Inventory Transaction Detail: Standard Buttons: Edit, Delete, Close, Choose Owner, Choose Planned Time, Choose Status, Choose Minischedule, Choose Maxischedule, Edit Details

Quick search 32°C Mostly sunny 13:40 08-09-2025

# Create An Expected Delivery Date Validation Rule To A Employee Object

The screenshot shows the Salesforce Setup interface for creating a validation rule. The URL in the browser is <https://orgfarm-0233f13896-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01IgL000001rAzx/ValidationRules/new>.

The page title is "purchase order Validation Rule". The "Rule Name" field contains "Expected\_Delivery\_Date\_Validation". The "Active" checkbox is checked. The "Description" field is empty.

The "Error Condition Formula" section includes an example formula: `Discount_Percent__c>0.30`. It also includes a "More Examples..." link and a note: "If this formula expression is true, display the text defined in the Error Message area".

The "Functions" dropdown shows "All Function Categories" with options like ABS and ACOS listed.

The left sidebar lists various setup categories: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, and Related Lookup Filters.

The bottom navigation bar includes icons for Quick search, Home, and various system links, along with a status bar showing "Nifty midcap +0.80%" and the date "08-09-2025".

Q profiles

Users Profiles

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

## Profiles

All Profiles [Edit](#) | [Delete](#) | [Create New View](#)

Action	Profile Name	User License	Custom
<a href="#">Edit</a>   <a href="#">Clone</a>	Analytics Cloud Integration User	Analytics Cloud Integration User	<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Clone</a>	Analytics Cloud Security User	Analytics Cloud Integration User	<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Clone</a>	Advanced Integration	Identity	<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Clone</a>	Authenticated_Website	Authenticated Website	<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Clone</a>	Authenticated_Website	Authenticated Website	<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Clone</a>	B2B_Records_Dot_Portal_Buyer_Profile	External Apps Login	<input checked="" type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Clone</a>	Chatter_External_User	Chatter External	<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Clone</a>	Chatter_Free_User	Chatter Free	<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Clone</a>	Chatter_Moderator_User	Chatter Free	<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Clone</a>	Contact_Manager	Salesforce	<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Clone</a>	Cross_Org_Data_Proxy_User	XOrg Proxy User	<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Clone</a>	Custom_Marketing_Profile	Salesforce	<input checked="" type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Clone</a>	Custom_Sales_Profile	Salesforce	<input checked="" type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Clone</a>	Custom_Support_Profile	Salesforce	<input checked="" type="checkbox"/>

5-25 of 46 [Selected](#) [4 Process Next](#) [»](#)

Page 1

<https://lightning-test-1120127a-dev-ed.develop.lightning.force.com/lightning/setup/enhancedProfiles/home>

# Create An Inventory Manager Profile

Q profiles

Users Profiles

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

## Profiles

Data Share Target Definition        Work Type Groups

Data Share Target Definition Maps

### Custom Object Permissions

	Data Access				Data Administration		
	Read	Create	Edit	Delete	<a href="#">View All Records</a>	<a href="#">Modify All Records</a>	<a href="#">View All Fields</a>
Billings	<input type="checkbox"/>						
Customer Orders	<input type="checkbox"/>						
Inventory Transactions	<input checked="" type="checkbox"/>						
Items	<input type="checkbox"/>						
Jewel Customers	<input type="checkbox"/>						
Order Items	<input checked="" type="checkbox"/>						
Prices	<input type="checkbox"/>						
Products	<input type="checkbox"/>						
Product	<input type="checkbox"/>						
Purchase Orders	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Suppliers	<input type="checkbox"/>						

### Session Settings

Session Times Out After [2 hours of inactivity](#) Session Security Level Required at Login [None](#)

### Password Policies

User passwords expire in [90 days](#) Enforce password history [3 passwords remembered](#)

# Create A Purchasing Manager Role.

Project Manager

SETUP Roles

## Understanding Roles

Set up your Role Hierarchy to control how your organization reports on and accesses data.

Sample Role Hierarchy

View other sample Role Hierarchies: [Territory-based Sample](#)

The screenshot shows a sample role hierarchy diagram. At the top level, there is a box labeled "Executive Staff" containing "CEO", "President", "CFO", and "VP, Sales". Arrows point from these four roles down to three middle-level boxes: "Western Sales Director", "Eastern Sales Director", and "International Sales Director". Each of these middle-level boxes contains a person icon and the title. Below each middle-level box, there are two lower-level boxes: "Western Sales Rep" and "Eastern Sales Rep" under the Western and Eastern Directors respectively, and "International Sales Rep" under the International Director. Each of these lower-level boxes also contains a person icon and the title. To the right of the hierarchy, there are three columns of descriptive text corresponding to each level:

- Executive Staff:**
  - View & edit data, roll up forecasts, & generate reports for all users below
  - Can't access data of other Executive Staff
- Western Sales Director, Eastern Sales Director, International Sales Director:**
  - View & edit data, roll up forecasts, & generate reports for all users directly below
  - Can't access data of users above or at same level
- Western Sales Rep, Eastern Sales Rep, International Sales Rep:**
  - View & edit data, roll up forecasts, & generate reports only for own data
  - Can't access data of users above or at same level

Profiles | Salesforce

orgfarm-0233f13896-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00egL000004UF0v%2Fe%3FretURL%3D%252F00egL00... Error 00:06:31

Setup Home Object Manager

Search Setup

00:06:31

Profile Edit Inventory Manager1

Set the permissions and page layouts for this profile.

Profile Edit

Name: Inventory Manager1

User License: Salesforce

Custom Profile: ✓

Description:

Custom App Settings

	Visible	Default		Visible	Default	
All Tabs (standard__AllTabSet)	<input checked="" type="checkbox"/>	<input type="radio"/>		My Service Journey (standard__MSJApp)	<input checked="" type="checkbox"/>	<input type="radio"/>
Analytics Studio (standard__Insights)	<input checked="" type="checkbox"/>	<input type="radio"/>		Queue Management (standard__QueueManagement)	<input checked="" type="checkbox"/>	<input type="radio"/>
App Launcher (standard__AppLauncher)	<input checked="" type="checkbox"/>	<input type="radio"/>		Sales (standard__LightningSales)	<input checked="" type="checkbox"/>	<input type="radio"/>
Approvals (standard__Approvals)	<input checked="" type="checkbox"/>	<input type="radio"/>		Sales (standard__Sales)	<input checked="" type="checkbox"/>	<input type="radio"/>

Save Save & New Cancel

Hyperforce Assistant

Users Profiles

Data Mass Transfer Approval Requests

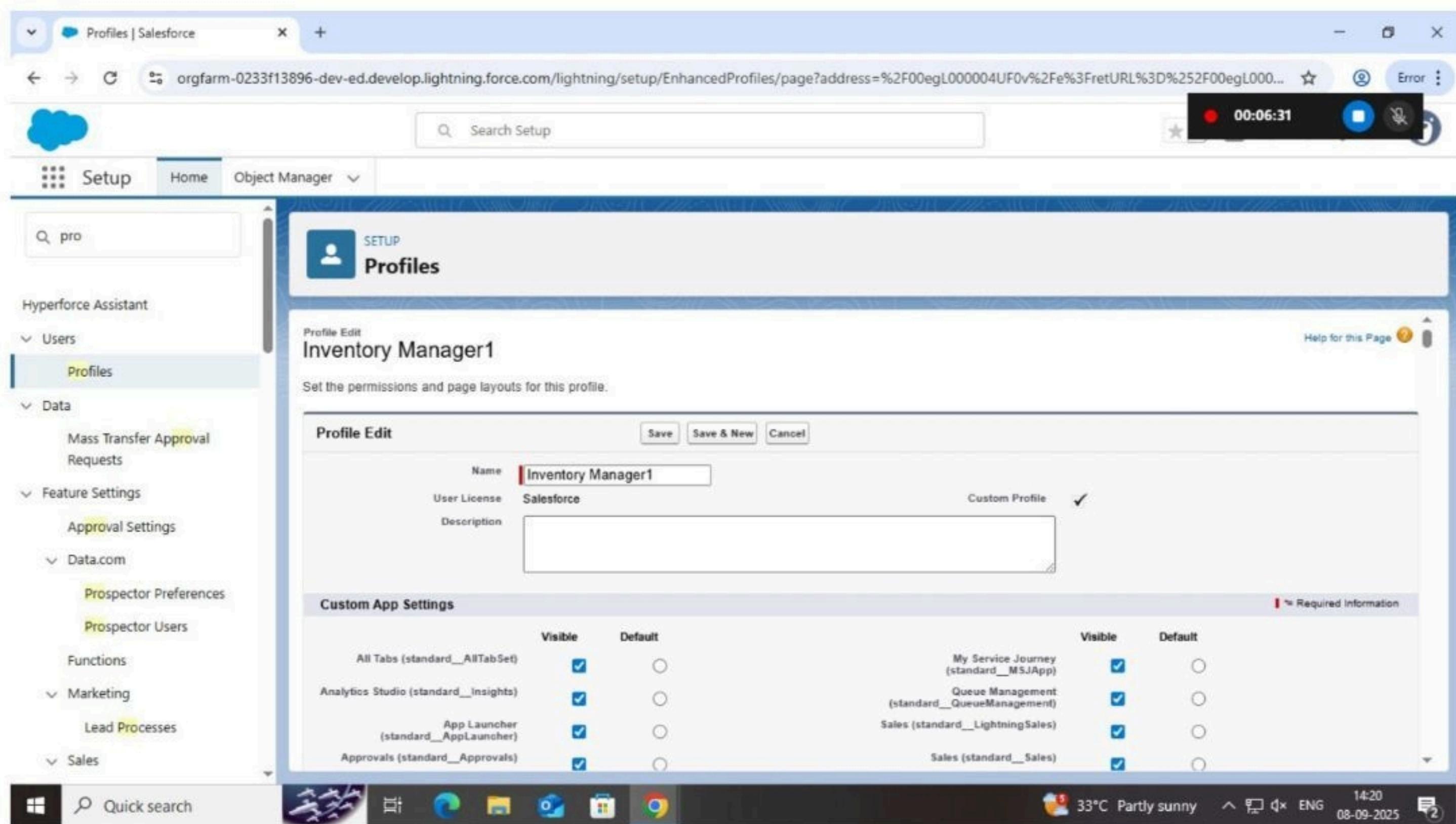
Feature Settings Approval Settings

Data.com Prospector Preferences Prospector Users Functions

Marketing Lead Processes

Sales

Quick search 33°C Partly sunny 14:20 08-09-2025



Profiles | Salesforce

orgfarm-0233f13896-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00egL000004UF0v%2Fe%3FretURL%3D%252F00egL00... Error 00:06:45

Setup Home Object Manager

Search Setup

00:06:45

SESSION SETTINGS

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login: --None--

PASSWORD POLICIES

User passwords expire in: Never expires

Enforce password history: 3 passwords remembered

Minimum password length: 6

Password complexity requirement: Must include alpha and numeric characters

Password question requirement: Cannot contain password

Maximum invalid login attempts: 10

Lockout effective period: 15 minutes

Obfuscate secret answer for password resets:

Require a minimum 1 day password lifetime:

Don't immediately expire links in forgot password emails:

Save Save & New Cancel

Hyperforce Assistant

Users Profiles

Data Mass Transfer Approval Requests

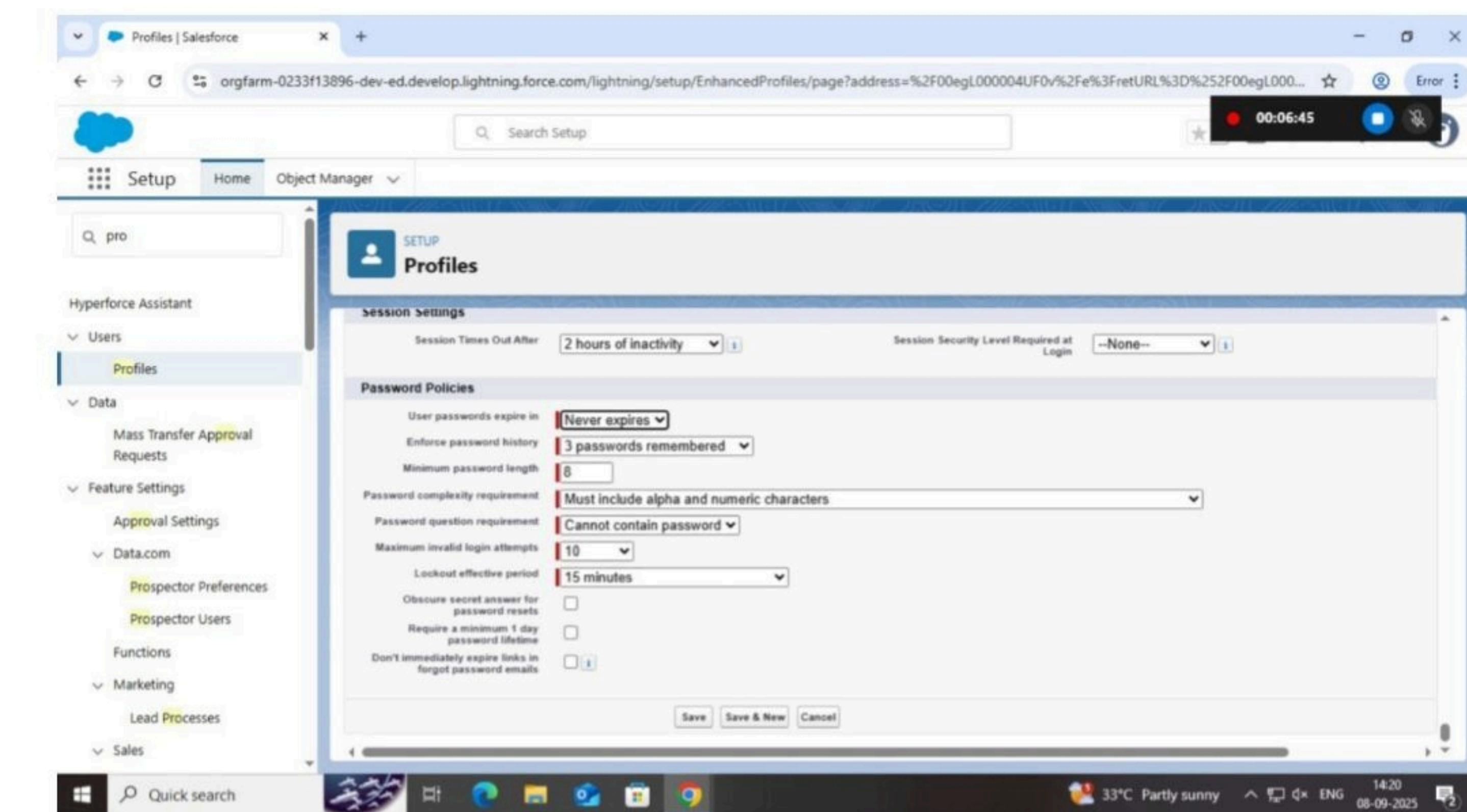
Feature Settings Approval Settings

Data.com Prospector Preferences Prospector Users Functions

Marketing Lead Processes

Sales

Quick search 33°C Partly sunny 14:20 08-09-2025



# Create A Permission Set.

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

- Page Header:** SETUP
- Section Header:** Permission Sets
- Section Subtitle:** View All
- Text:** Here you can create, view, and manage permission sets.
- Buttons:** Permission Sets ▾, Edit | Delete | Create New View
- Search Bar:** Search
- Filter:** Filter
- Table Headers:** A, B, C, D, E, F, G, H, I, J, K, L, M, N, O, P
- Table Rows:** The table lists various permission sets with their descriptions and associated licenses. Some rows are collapsed.

#	Permission Set Label	Description	License
1	Buyer	Allows access to the store. Lets users see products and categories, make purchases, and view order history.	B2B Buyer Permission Set One
2	Buyer Manager	Includes all Buyer capabilities, and allows access to manage carts and orders.	B2B Buyer Manager Permission Set
3	C360 High Scale Flow Integration User	Allows integration user to access features specific to C360 High Scale Flow.	Cloud Integration User
4	CRM User	Denotes that the user is a Sales Cloud or Service Cloud user.	CRM User
5	Commerce Admin	Allow access to commerce admin features.	Commerce Admin Permission Set
6	Contact Center Admin	Manage Service Cloud Voice contact centers that use Amazon Connect as the provider.	Service Cloud Voice User
7	Contact Center Admin (Partner Telephony)	Manage Service Cloud Voice contact centers that use your preferred telephony provider.	Service Cloud Voice User (Partner)
8	Contact Center Agent	Access agent features in Service Cloud Voice contact centers that use Amazon Connect as the provider.	Service Cloud Voice User
9	Contact Center Agent (Partner Telephony)	Access agent features in Service Cloud Voice contact centers that use your preferred telephony provider.	Service Cloud Voice User (Partner)
10	Contact Center Supervisor	Access supervisor features in Service Cloud Voice contact centers that use Amazon Connect as the provider.	Service Cloud Voice User
11	Contact Center Supervisor (Partner Telephony)	Access supervisor features in Service Cloud Voice contact centers that use your preferred telephony provider.	Service Cloud Voice User (Partner)
12	Data Cloud Home Org Integration User	Allows integration user to access entities specific to Remote Data Cloud.	Cloud Integration User
13	DeliveryEstimationServicePermSet		Cloud Integration User
14	Clone	Experience Profile Manager	Salesforce

# Create A Trigger To Calculate Total Amount On Order Item.

The screenshot shows the Oracle SQL Developer interface with a code editor containing a trigger script. The script is designed to update purchase orders if there are any changes made to order items. It includes logic to check if the purchase list is empty, update it if necessary, and then calculate the total amount for each item. The code editor has line numbers from 94 to 111. Below the editor, the 'Problems' tab shows one warning: 'Variable does not exist: CalculateTotalAmountHandler'. The status bar at the bottom indicates the file is saved.

```
94
95
96
97    // Update Purchase Orders if there are any changes
98
99 *   if (!purchaseToUpdate.isEmpty()) {
100
101     update purchaseToUpdate;
102
103   }
104
105 }
106
107 }
108
109 }
110
111 }
```

File: calculateTotalAmountTrigger.sql | Line: 5 | Problems: 0

Variable does not exist: CalculateTotalAmountHandler

```

public class CalculateTotalAmountHandler {

    public static void calculateTotal(
        List<Order_Item__c> newItems,
        List<Order_Item__c> oldItems,
        Boolean isInsert,
        Boolean isUpdate,
        Boolean isDelete,
        Boolean isUndelete
    ) {
        // Track parent Purchase Orders
        Set<Id> parentIds = new Set<Id>();

        // For insert, update, undelete → capture new parent Ids
        if (isInsert || isUpdate || isUndelete) {
            for (Order_Item__c item : newItems) {
                if (item.Purchase_Order_Id__c != null) {
                    parentIds.add(item.Purchase_Order_Id__c);
                }
            }
        }

        // For update, delete → capture old parent Ids
        if (isUpdate || isDelete) {
            for (Order_Item__c item : oldItems) {
                if (item.Purchase_Order_Id__c != null) {
                    parentIds.add(item.Purchase_Order_Id__c);
                }
            }
        }

        if (!parentIds.isEmpty()) {
            // Aggregate Order Item Amounts per Purchase Order
            Map<Id, Decimal> totalsMap = new Map<Id, Decimal>();
            for (AggregateResult ar : [
                SELECT Purchase_Order_Id__c, SUM(Amount__c) totalAmount
                FROM Order_Item__c
                WHERE Purchase_Order_Id__c IN :parentIds
                GROUP BY Purchase_Order_Id__c
            ]) {
                totalsMap.put((Id)ar.get('Purchase_Order_Id__c'), (Decimal)ar.get('totalAmount'));
            }

            // Build Purchase Order updates
            List<Purchase_Order__c> updates = new List<Purchase_Order__c>();
            for (Id pold : parentIds) {
                Decimal total = totalsMap.containsKey(pold) ? totalsMap.get(pold) : 0;
                updates.add(new Purchase_Order__c(
                    Id = pold,
                    Total_Order_cost__c = total
                ));
            }

            // Update parent Purchase Orders
            if (!updates.isEmpty()) {
                update updates;
            }
        }
    }
}

```

**Flow Builder**

Select Elements | Auto-Layout | Save | Debug | View Tests | Save As New Version | **Active**

**Record-Triggered Flow**

Start

Object: Select an object [Edit](#)

Trigger: A record is created

Optimize for: Actions and Related Recor...

[Open Flow Trigger Explorer](#)

**End**

### Configure Start

Select Object

Select the object whose records trigger the flow when they're created, updated, or deleted.

\* Object

Search object:

- Account
- Activation Target
- Activation Target Platform
- Activation Target Platform Field Value
- Address
- Agent Work
- Analytics User Attribute Function Token

Condition Requirements

None

A number of times the flow is executed. Minimizing unnecessary flow executions helps!

— +

**Flow Builder** | Actual Delivery Date Updating - V1 | **Active**

Select Elements | Auto-Layout | Save | Debug | View Tests | Save As New Version | **Active**

Object: Purchase Order [Edit](#)

Trigger: A record is created or updated

Optimize for: Actions and Related Recor...

+ Add Scheduled Paths (Optional)

[Open Flow Trigger Explorer for Purcha...](#)

**Run Immediately**

**Get Purchase Record** Get Records

**Assignment**

**Updating Purchasing Order** Update Records

**End**

**Update Records**

\* Label: Updating Purchasing Order [Edit](#)

\* API Name: Updating\_Purchasing\_Order

Description:

\* How to Find Records to Update and Set Their Values

- Use the purchase order record that triggered the flow
- Update records related to the purchase order record that triggered the flow
- Use the IDs and all field values from a record or record collection
- Specify conditions to identify records, and set fields individually

**Set Filter Conditions**

Condition Requirements to Update Record

None—Always Update Record

**Set Field Values for the Purchase Order Record**

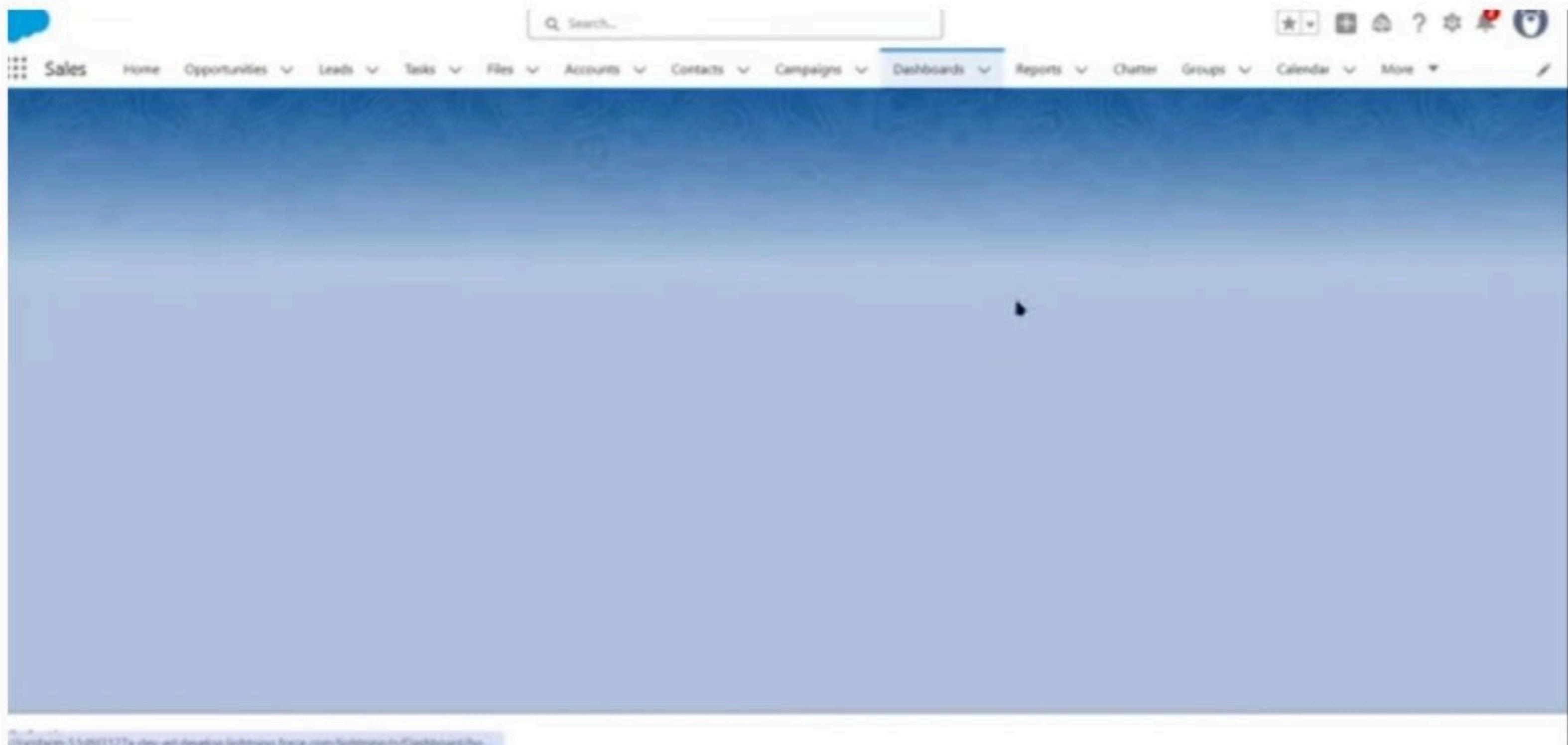
Field	Value
Actual Delivery Date X	ActualDeliveryDate X

[Add Field](#)

# View Dashboard

The screenshot shows the Salesforce Setup interface with the 'App Manager' tab selected. The main content area is titled 'Lightning Experience App Manager' and displays a list of 27 items. The table columns are: App Name, Developer Name, Description, Last Modified Date, App Type, and Visibility. The 'App Type' column shows a mix of 'Classic' and 'Lightning' applications. The 'Visibility' column includes checkboxes for 'Visible' and 'Mobile'. A specific row for 'Medical Inventory Management' is highlighted with a blue border.

App Name	Developer Name	Description	Last Modified Date	App Type	Visible
Analytics Studio	Insights	Build CRM Analytics dashboards and apps	6/23/2025, 6:44 PM	Classic	<input checked="" type="checkbox"/>
Approvals	Approvals	Manage approvals and approval flows	6/23/2025, 6:44 PM	Lightning	<input checked="" type="checkbox"/>
Automations	FlowsApp	Automate business processes and repetitive tasks	6/23/2025, 6:50 PM	Lightning	<input checked="" type="checkbox"/>
Bolt Solutions	LightningBolt	Discover and manage business solutions designed for your industry	6/23/2025, 6:44 PM	Lightning	<input checked="" type="checkbox"/>
Community	Community	Salesforce CRM Communities	6/23/2025, 6:44 PM	Classic	<input checked="" type="checkbox"/>
Content	Content	Salesforce CRM Content	6/23/2025, 6:44 PM	Classic	<input checked="" type="checkbox"/>
Data Manager	DataManager	Use Data Manager to view limits, monitor usage, and manage recipes	6/23/2025, 6:44 PM	Lightning	<input checked="" type="checkbox"/>
Digital Experiences	SalesforceCMS	Manage content and media for all of your sites	6/23/2025, 6:44 PM	Lightning	<input checked="" type="checkbox"/>
Jewellery Inventory System	Jewellery_Inventory_System	Elevate your look with elegance	6/26/2025, 11:20 AM	Lightning	<input checked="" type="checkbox"/>
Lightning Usage App	LightningInstrumentation	View Adoption and Usage Metrics for Lightning Experience	6/23/2025, 6:44 PM	Lightning	<input checked="" type="checkbox"/>
Marketing CRM Classic	Marketing	Track sales and marketing efforts with CRM objects	6/23/2025, 6:44 PM	Classic	<input checked="" type="checkbox"/>
Medical Inventory Management	Medical_Inventory_Management	Medical Inventory Management	6/26/2025, 10:53 PM	Lightning	<input checked="" type="checkbox"/>
My Service Journey	MSJApp	Discover new customer service capabilities	6/23/2025, 6:44 PM	Lightning	<input checked="" type="checkbox"/>
Platform	Platform	The fundamental Lightning Platform	6/23/2025, 6:44 PM	Classic	<input checked="" type="checkbox"/>



00g0f0m 55z002127a dev-ed-dev.lightning.force.com/lightning/c/dashboards/00g...

### Add Widget

**Report**

Purchase Orders based on Supplier

Use chart settings from report (1)

**Display As**

**Value**

Sum of Total Order Cost

**Sliced By**

Supplier ID

...Previous Next...

**Preview**

**Purchase Orders based on Suppliers**

Sum of Total Order Cost

Supplier ID

Supplier-001

Supplier-002

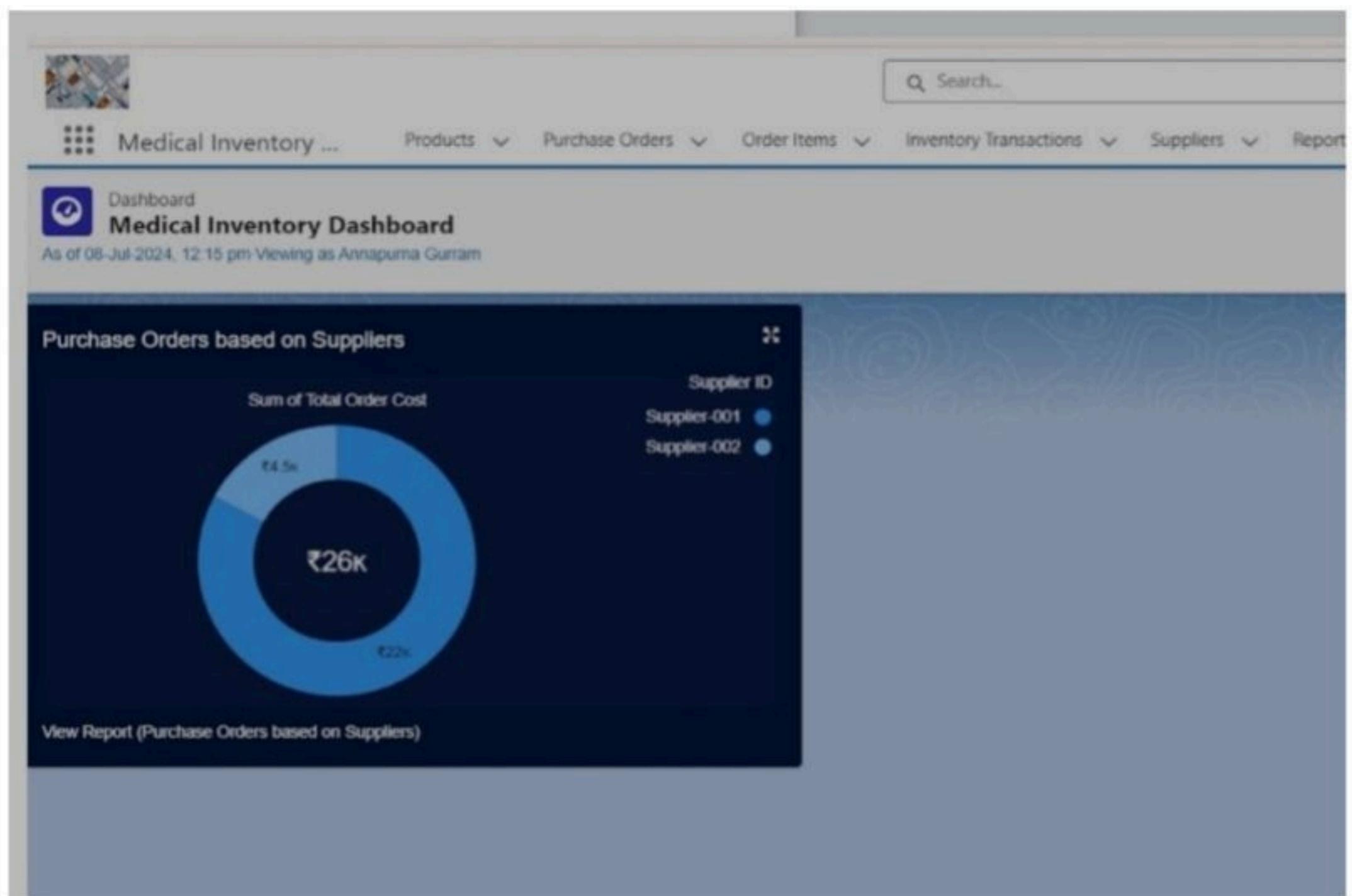
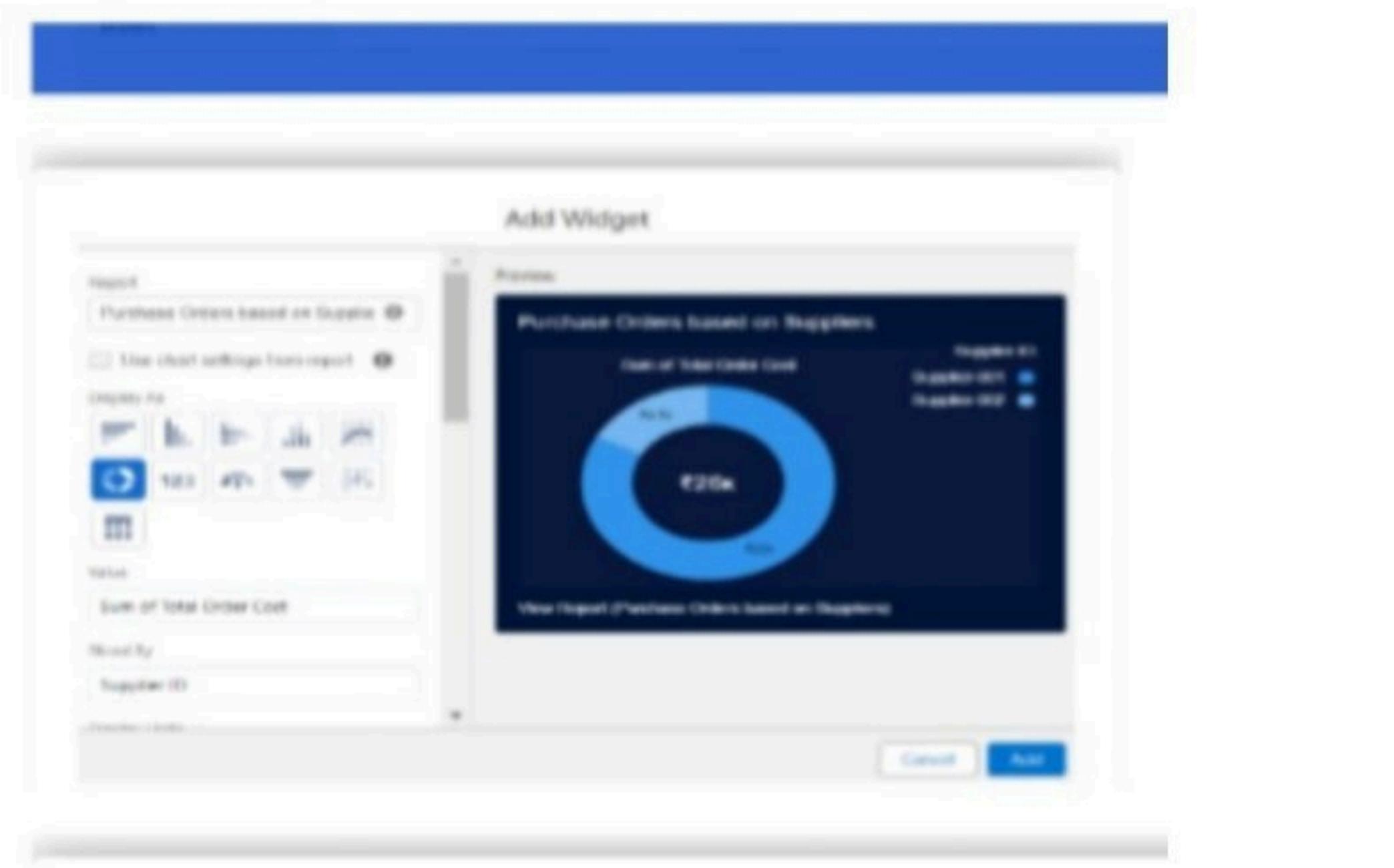
€26k

€20k

€46k

[View Report \(Purchase Orders based on Suppliers\)](#)

**Add**



"Medical Inventory DashBoard see graph view of records"