

# **Medical Inventory Management**

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**Code:** Bruag

**TEAM ID:**

**TEAM MEMBERS:4**

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# **Title: Medical Inventory Management**

## **Project Overview**

The Medical Inventory Management System is a comprehensive Salesforce application designed to streamline and automate the operational aspects of managing medical stock. The system maintains detailed supplier information, manages purchase orders, tracks products and order transactions, and monitors expiry dates.

With the help of custom objects, fields, validation rules, triggers, flows, reports, and dashboards, the application ensures:

- Accurate supplier management – maintaining detailed records including contact details.
- Efficient product tracking – product catalog with descriptions, stock levels, pricing, and expiry dates.
- Transparent purchase order management – track order dates, deliveries, and costs.
- Strong reporting & insights – supplier performance, order cost analysis, and product tracking.
- Automation & efficiency – streamline workflows, reduce manual work, and minimize errors.

## **Objectives**

- Streamline Inventory Management: Automate stock tracking, purchase orders, and supplier management.
- Enhance Accuracy: Monitor expiry dates, order costs, and delivery schedules to reduce risks.
- Improve Decision Making: Generate real-time reports on purchases, suppliers, and transactions.
- Ensure Transparency: Maintain detailed records of suppliers, products, and transactions.
- Promote Efficiency: Minimize delays in purchase order approvals and inventory movements.

## **Student Outcomes**

- Hands-on Salesforce Experience: Students gain practical exposure in Salesforce CRM development.
- Understanding of Object Relationships: Learn how to model and relate inventory entities like Supplier, Product, Purchase Order, and Order Items.

- **Data Validation Skills:** Apply rules to ensure data integrity (e.g., delivery dates, stock levels).
- **Real-Time Automation Exposure:** Work with flows and triggers to automate inventory updates.
- **Analytical Skills:** Generate and analyze meaningful reports and dashboards.
- **Industry-Relevant Knowledge:** Exposure to CRM-based supply chain and inventory solutions.

## System Requirements

### Hardware Requirements

- Minimum 4 GB RAM, Dual-core processor
- Stable internet connection

### Software Requirements

- Salesforce Developer Edition Org
- Modern Web Browser (Chrome / Firefox)

### Project Phases

Phase No.	Phase Name	Description	Pages
1	Requirement Analysis & Planning	Gather requirements from suppliers and staff; define scope and workflows.	4
2	Salesforce Development – Backend & Configurations	Create objects (Supplier, Product, Purchase Order, Order Item, Inventory Transaction), fields, and relationships.	5–15
3	UI/UX Development & Customization	Create Lightning App, Tabs, Layouts, and Compact Layouts.	16–25
4	Automation & Security	Implement Validation Rules, Profiles, Roles, Users, Permission Sets, Flows, and Triggers.	26–40

5	Reporting Dashboards &	Configure Reports, Dashboards, and analytics for supplier and order tracking.	41–50
6	Deployment, Documentation & Maintenance	Finalize app, test features, deploy, and prepare documentation.	51–55

**Project Duration: 31 Hours**

## Project Flow (Milestones)

### 1. Creation of Developer Account

- Sign up for a free Salesforce Developer Account at <https://developer.salesforce.com/signup>.
- Fill in details: First & Last Name, Email, Role = Developer, Company = College Name, Country = India, Postal Code = XXXX.
- Choose a Username in the format: username@organization.com.
- Click Sign Me Up → Check email → Verify account.

**Build enterprise-quality apps fast and get hands-on with Agentforce and Data Cloud.**

Sign up for your Developer Edition.

- ✓ 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

**Sign up for your Developer Edition**  
A free Salesforce Platform environment with Agentforce and Data Cloud

First name: Suyabharathi ✓ Last name: p ✓

Job title: Student ✓ Work email: 23bsds158suyabhara ✓

Company: Sri Krishna Adithya Co ✓ Country/Region: India ✓

Your org may be provisioned on or migrated to Hyperforce, Salesforce's public cloud infrastructure.

☐ I agree to the Main Services Agreement – Developer Services and Salesforce Program Agreement. I acknowledge, as described in the Developer Documentation: (1) the Developer Edition includes autonomous and other generative AI features; and (2) Salesforce may limit use of those features and the org, and may terminate any org that has been inactive for 45 days.

We value your privacy. To learn more, visit our [Privacy Statement](#).

- Set password, security question → Login to Salesforce Org.



Hi Suyabharathi,

Thanks for signing up for a Developer Edition. Now you can start building on Salesforce for free and get hands-on with Agentforce and Data Cloud.

There's just one more step. Use the following link to reset the password for your Developer Edition. This link expires in 24 hours.

[Reset Password](#)

To easily log in later, save this URL:

<https://orgfarm-099c758dca-dev-ed.develop.my.salesforce.com>

Here's the username for your Developer Edition:

[23bsds158suyabharathip969@agentforce.com](mailto:23bsds158suyabharathip969@agentforce.com)

Your Developer Edition, now enabled with Agentforce and Data Cloud, remains active as long as you continue to use it. It expires after 45 days of non-usage.

## 2. Object Creation

Objects are like database tables in Salesforce.

Custom Objects Created:

- Product → Product Name, Description, Unit Price, Expiry Date, Stock Level.

A screenshot of the Salesforce Setup > Object Manager page for the 'Product' object. The left sidebar shows a list of configuration options: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Restriction Rules, and Scoping Rules. The 'Details' section is selected and expanded, showing fields like Description, API Name (Product\_c), Custom (checked), Singular Label (Product), Plural Label (Products), and a list of system-generated fields: Enable Reports (checked), Track Activities (checked), Track Field History (checked), Deployment Status (Deployed), Help Settings, and Standard salesforce.com Help Window. 'Edit' and 'Delete' buttons are in the top right.

- Supplier → Supplier Name, Contact Person, Phone, Email.

SETUP > OBJECT MANAGER

## Purchase Order

**Details**

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

**Details**

Edit Delete

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

- Purchase Order → Supplier (Lookup), Order Date, Delivery Date, Total Cost.
- Order Item → Product (Lookup), Quantity Ordered, Amount.
- Inventory Transaction → Transaction Date, Type (Picklist: Issue/Receipt), Total Order Cost.

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

**Details**

Edit Delete

Description

API Name  
Inventory\_Transaction\_\_c

Custom  
✓

Singular Label  
Inventory Transaction

Plural Label  
Inventory Transactions

Enable Reports  
✓

Track Activities  
✓

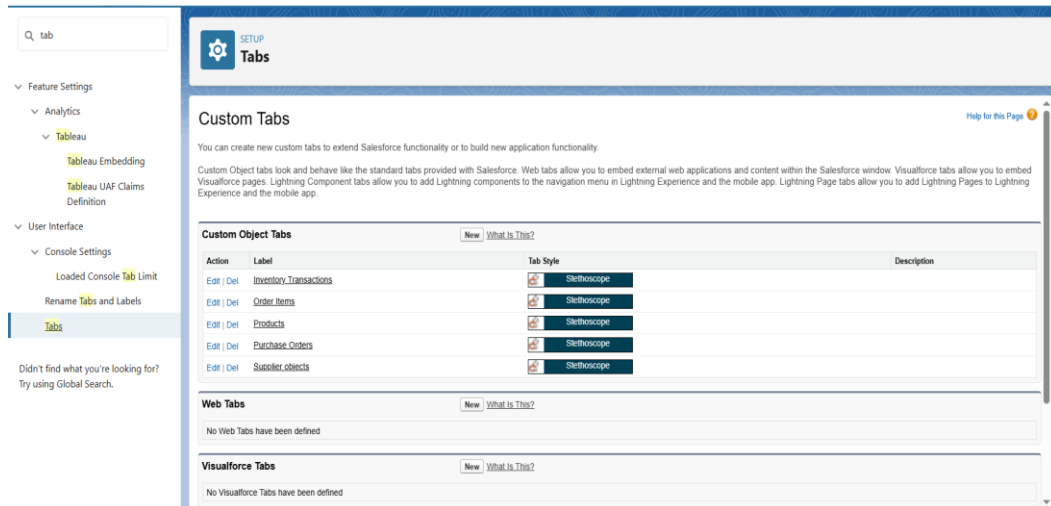
Track Field History

Deployment Status  
Deployed

Help Settings  
Standard salesforce.com Help Window

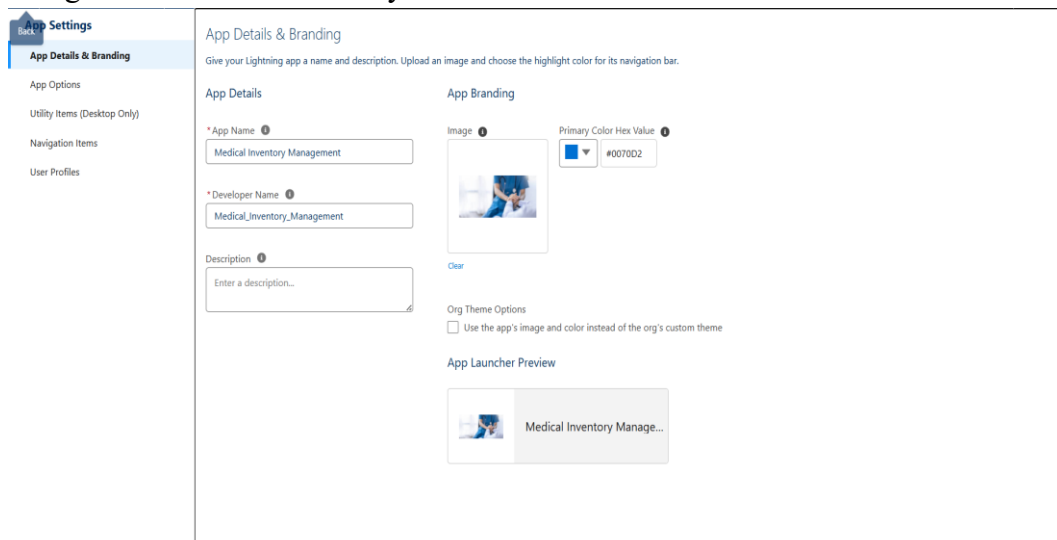
### 3. Tabs

- Create Tabs for each custom object to make them visible to users.
- Example: Product Tab → Setup → Tabs → New → Select Object → Choose Style → Save.
- Repeat for: Purchase Order, Order Item, Inventory Transaction, Supplier.



### 4. The Lightning App

- Go to Setup → App Manager → New Lightning App.
- Name: Medical Inventory Management.
- Add Navigation Items: Product, Supplier, Purchase Order, Order Item, Inventory Transaction, Reports, Dashboards.
- Assign to System Administrator → Save.



## 5. Fields

- Create fields for each object.
- Examples:
  - *Product*: Product Name (Text), Description (Text Area), Unit Price (Currency), Stock Level (Number), Expiry Date (Date).
  - *Purchase Order*: Order Date (Date), Supplier (Lookup), Total Order Cost (Currency).
  - *Order Item*: Quantity Ordered (Number), Unit Price (Formula), Amount (Formula).
  - *Inventory Transaction*: Transaction Type (Picklist: Issue, Receipt, Adjustment).

Details	<b>Fields &amp; Relationships</b> 15 Items, Sorted by Field Label				
	<input type="text" value="Q Quick Find"/> <a href="#">New</a> <a href="#">Deleted Fields</a> <a href="#">Field Dependencies</a> <a href="#">Set History Tracking</a>				
<b>Fields &amp; Relationships</b>	<b>FIELD LABEL</b>	<b>FIELD NAME</b>	<b>DATA TYPE</b>	<b>CONTROLLING FIELD</b>	<b>INDEXED</b>
Page Layouts	Available Quantity	AvailableQuantity	Number(16, 2)		
Lightning Record Pages	Created By	CreatedById	Lookup(User)		
Buttons and Links	End Date	EndDate	Date		
Compact Layouts	Last Modified By	LastModifiedById	Lookup(User)		
Field Sets	Line Description	Description	Text(255)		
Object Limits	List Price	ListPrice	Currency(16, 2)		
Triggers	Order	OrderId	Lookup(Order)		✓
Flow Triggers	Order Product Number	OrderItemNumber	Auto Number		✓
Validation Rules	Original Order Product	OriginalOrderItemId	Lookup(Order Product)		✓
Conditional Field Formatting	Product	Product2Id	Lookup(Product)		✓
	Quantity	Quantity	Number(16, 2)		
	Reference Price	ReferencePrice	Currency(16, 2)		

<b>Fields &amp; Relationships</b> 15 Items, Sorted by Field Label			<input type="text" value="Q Quick Find"/>	<a href="#">New</a>	<a href="#">Deleted Fields</a>	<a href="#">Field Dependencies</a>	<a href="#">Set History Tracking</a>
End Date	EndDate	Date					
Last Modified By	LastModifiedById	Lookup(User)					
Line Description	Description	Text(255)					
List Price	ListPrice	Currency(16, 2)					
Order	OrderId	Lookup(Order)					✓
Order Product Number	OrderItemNumber	Auto Number					✓
Original Order Product	OriginalOrderItemId	Lookup(Order Product)					✓
Product	Product2Id	Lookup(Product)					✓
Quantity	Quantity	Number(16, 2)					
Reference Price	ReferencePrice	Currency(16, 2)					
Start Date	ServiceDate	Date					
Total Price	TotalPrice	Currency(16, 2)					
Unit Price	UnitPrice	Currency(16, 2)					



## 6. Page Layouts

- Customize layouts for each object.

The screenshot shows the 'Purchase Order Detail' layout. The left sidebar contains a navigation menu with options like 'Details', 'Fields & Relationships', 'Page Layouts', 'Lightning Record Pages', 'Buttons, Links, and Actions', 'Compact Layouts', 'Field Sets', 'Object Limits', 'Record Types', 'Related Lookup Filters', 'Search Layouts', 'List View Button Layout', and 'Restriction Rules'. The main content area displays the 'Purchase Order Detail' layout with a header section containing 'Purchase Order ID', 'Supplier ID', 'Order Date', 'Expected Delivery Date', 'Actual Delivery Date', 'Order Count', 'Total Order Cost', 'Owner', and 'Order Item'. Below the header is a 'System Information' section with 'Created By' and 'Last Modified By' fields. The 'Fields' section on the left lists various fields like 'Expected Delivery...', 'Last Modified By', 'Order Item', 'Purchase Order ID', 'Order Items', 'Purchase Order Name', 'Supplier ID', 'Owner', 'Product ID', and 'Total Order Cost'.

- Example: Purchase Order Layout → Make *Order Date* Required, *Total Cost* Read-Only.

The screenshot shows the 'Inventory Transaction Detail' layout. The left sidebar contains a navigation menu with options like 'Details', 'Fields & Relationships', 'Page Layouts', 'Lightning Record Pages', 'Buttons, Links, and Actions', 'Compact Layouts', 'Field Sets', 'Object Limits', 'Record Types', 'Related Lookup Filters', 'Search Layouts', 'List View Button Layout', and 'Restriction Rules'. The main content area displays the 'Inventory Transaction Detail' layout with a header section containing 'Transaction ID', 'Purchase Order ID', 'Transaction Type', 'Transaction Date', 'Total Order Cost', 'Owner', and 'Inventory Transaction Name'. Below the header is a 'System Information' section with 'Created By' and 'Last Modified By' fields. The 'Fields' section on the left lists various fields like 'Transaction ID', 'Purchase Order ID', 'Transaction Type', 'Transaction Date', 'Total Order Cost', 'Owner', 'Inventory Transaction Name', and 'Transaction Name'.

- Arrange related fields logically.

The screenshot shows the 'Product Information' layout. The left sidebar contains a navigation menu with options like 'Details', 'Fields & Relationships', 'Page Layouts', 'Lightning Record Pages', 'Buttons and Links', 'Compact Layouts', 'Field Sets', 'Object Limits', 'Triggers', 'Flow Triggers', 'Validation Rules', and 'Conditional Field Formatting'. The main content area displays the 'Product Information' layout with a header section containing 'Product Code', 'List Price', 'Unit Price', 'Quantity', 'Total Price', 'Line Description', and 'Start Date'. Below the header is a 'System Information' section with 'Created By' and 'Last Modified By' fields. The 'Fields' section on the left lists various fields like 'Product Code', 'List Price', 'Unit Price', 'Quantity', 'Total Price', 'Line Description', and 'Start Date'.

## 7. Compact Layouts

- Create Compact Layouts to show important fields at record highlights.
- *Product Compact Layout:* Product Name, Unit Price, Stock Level.

- *Purchase Order Compact Layout:* Order ID, Order Date, Supplier, Total Cost.

## 8. Validation Rules

- Add data quality rules. Example: Purchase Order Delivery Date Validation

- $(\text{Expected\_Delivery\_Date\_c} - \text{Order\_Date\_c}) > 7$

Error: *Expected Delivery Date cannot exceed 7 days.*

9. Profiles

- Define user permissions.
- Profiles Created:

Inventory Manager → Access to Product & Inventory

Profile Edit

Standard User

Help for this Page

Set the permissions and page layouts for this profile.

Profile Edit

SaveSave & NewCancel

NameStandard User

User LicenseSalesforce

Custom Profile☐

Custom App Settings

Required Information

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

Custom Object Permissions

	Basic Access				Data Administration				Basic Access				Data Administration		
	Read	Create	Edit	Delete	View All Records	Modify All Records	View All Fields		Read	Create	Edit	Delete	View All Records	Modify All Records	View All Fields
Inventory Transactions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Products	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Order Items	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Purchase Orders	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Order Items	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Supplier objects	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Order Items	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<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

Minimum password length

8

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

Obscure secret answer for password resets

☐

Require a minimum 1 day password

☐

- Purchase Manager → Access to Suppliers & Orders.

## 10. Roles

- Define record-level access.
- Roles Created:

The screenshot shows the Salesforce Setup interface for editing a user. The left sidebar contains navigation links: Setup, Home, Object Manager, Users, Roles, and Feature Settings. The main content area is titled 'User Edit' and includes a 'General Information' section with fields for First Name, Last Name, Email, Username, Nickname, Title, Company, Department, and Division. The 'Role' dropdown is set to 'Inventory Manager'. The 'User License' dropdown is set to 'Salesforce'. The 'Profile' dropdown is set to 'Inventory Manager'. The 'Active' checkbox is checked. The 'Marketing User' checkbox is unchecked. The 'Office User' checkbox is unchecked. The 'Knowledge User' checkbox is unchecked. The 'Flow User' checkbox is unchecked. The 'Service Cloud User' checkbox is unchecked. The 'Site.com Contributor User' checkbox is unchecked. The 'Site.com Publisher User' checkbox is unchecked. The 'Web User' checkbox is unchecked. The 'Data.com User Type' dropdown is set to 'None'. The 'Data.com Monthly Addition Limit' dropdown is set to 'None'. The 'Accessibility Mode (Classic Only)' dropdown is set to 'None'. The 'High-Contrast Palette on Charts' checkbox is checked. The 'Load Lightning Pages While Scrolling' checkbox is checked. The 'Debug Mode' checkbox is unchecked.

### 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](#)



[Set Up Roles](#)

☐ Don't show this page again

The screenshot shows the Salesforce Setup interface for editing a role. The left sidebar contains navigation links: Setup, Home, Object Manager, Users, Roles, and Feature Settings. The main content area is titled 'Role Edit: Purchasing Manager'. The 'Role Edit' section includes fields for Label, Role Name, and This role reports to. The 'Label' field is set to 'Purchasing Manager'. The 'Role Name' field is set to 'Purchasing\_Manager'. The 'This role reports to' field is set to 'SVP, Sales & Marketing'. The 'Role Name as displayed on reports' field is empty. The 'Save', 'Save & New', and 'Cancel' buttons are visible at the bottom.

The screenshot shows the Salesforce Setup interface for editing a role. The left sidebar contains navigation links: Setup, Home, Object Manager, Users, Roles, and Feature Settings. The main content area is titled 'Role Edit: Inventory Manager'. The 'Role Edit' section includes fields for Label, Role Name, and This role reports to. The 'Label' field is set to 'Inventory Manager'. The 'Role Name' field is set to 'Inventory\_Manager'. The 'This role reports to' field is set to 'SVP, Sales & Marketing'. The 'Role Name as displayed on reports' field is empty. The 'Save', 'Save & New', and 'Cancel' buttons are visible at the bottom.

11. Users

- Add users and assign Roles & Profiles.
- Example:
  - John → Role: Purchase Manager, Profile: Purchase Manager.

Setup

Home

Object Manager

users

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector

Users

Didn't find what you're looking for?

Try using Global Search.

User Edit

John PuchasEM

Save

Save & New

Cancel

Help for this Page

General Information

First Name

Last Name

Alias

Email

Username

Nickname

Title

Company

Department

Division

Role

User License

Profile

Active

Marketing User

Offline User

Knowledge User

Flow User

Service Cloud User

Site.com Contributor User

Site.com Publisher User

WDC User

Data.com User Type

Data.com Monthly Addition Limit

Accessibility Mode (Classic Only)

- Ram → Role: Inventory Manager, Profile: Inventory Manager.

User

Ram Krishna

Permission Set Assignments

Permission Set Assignments: Activation Required

Permission Set Group Assignments

Permission Set License Assignments

Personal Groups

Public Group Membership

Queue Membership

Team

Managers in the Role Hierarchy

OAuth Apps

Third-Party Account Links

Built-In Authenticators

Installed Mobile Apps

Authentication Settings for External Systems

Login History

User Provisioning Accounts

User Profile Help for this Page

User Detail

Edit

Sharing

Reset Password

Freeze

View Summary

Name

Alias

Email

Username

Nickname

Title

Company

Department

Division

Address

Time Zone

Locale

Language

Delegated Approver

Manager

Receive Approval Request Emails

Federation ID

Role

User License

Profile

Active

Marketing User

Offline User

Knowledge User

Flow User

Service Cloud User

Site.com Contributor User

Site.com Publisher User

WDC User

Mobile Push Registrations

Data.com User Type

Accessibility Mode (Classic Only)

Debug Mode

High-Contrast Palette on Charts

User

John PuchasEM

Permission Set Assignments

Permission Set Assignments: Activation Required

Permission Set Group Assignments

Permission Set License Assignments

Personal Groups

Public Group Membership

Queue Membership

Team

Managers in the Role Hierarchy

OAuth Apps

Third-Party Account Links

Built-In Authenticators

Installed Mobile Apps

Authentication Settings for External Systems

Login History

User Provisioning Accounts

User Profile Help for this Page

User Detail

Edit

Sharing

Reset Password

Freeze

View Summary

Name

Alias

Email

Username

Nickname

Title

Company

Department

Division

Address

Time Zone

Locale

Language

Delegated Approver

Manager

Receive Approval Request Emails

Federation ID

Role

User License

Profile

Active

Marketing User

Offline User

Knowledge User

Flow User

Service Cloud User

Site.com Contributor User

Site.com Publisher User

WDC User

Mobile Push Registrations

Data.com User Type

Accessibility Mode (Classic Only)

Debug Mode

High-Contrast Palette on Charts

- 12. Permission Sets

- Extra access beyond profiles.

Permission Set

Purchase Manager Create Access 1

Find Settings...CloneEdit PropertiesManage AssignmentsView Summary

Permission Set Overview > Object Settings > Order Items

Order Items

Tab Settings

Available	Visible
<input type="checkbox"/>	<input checked="" type="checkbox"/>

Object Permissions

Permission Name	Enabled
Read	<input checked="" type="checkbox"/>
Create	<input checked="" type="checkbox"/>
Edit	<input type="checkbox"/>
Delete	<input type="checkbox"/>
View All Records	<input type="checkbox"/>
Modify All Records	<input type="checkbox"/>
View All Fields	<input type="checkbox"/>

- Example: Create Purchase Manager Create Access → Assign to John.

All Users

7 items • Sorted by Full Name • Filtered by All users • Updated a few seconds ago

Search this list...

	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/>	Chatter Expert	Chatter	chatty.00dgl00000biuj3uap.heckpoyhvg1@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/>	Integration User	integ	integration@00dgl00000biuj3uap.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/>	John PuchaseM	jpuch	rfd@gmail.com	Purchasing...	<input checked="" type="checkbox"/>	Purchase Manager
<input type="checkbox"/>	Orgfarm EPIC	OEPIC	epic.e5d59ccd38d1@orgfarm.salesforce.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>	Ram Krishna	r kri	23bsds158suyabharathihgp@skacas.ac.in	Inventory ...	<input checked="" type="checkbox"/>	Inventory Manager
<input type="checkbox"/>	Security User	sec	insightssecurity@00dgl00000biuj3uap.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User
<input type="checkbox"/>	Suyabharathi P	23b	23bsds158suyabharathip969@agentforce.com		<input checked="" type="checkbox"/>	System Administrator

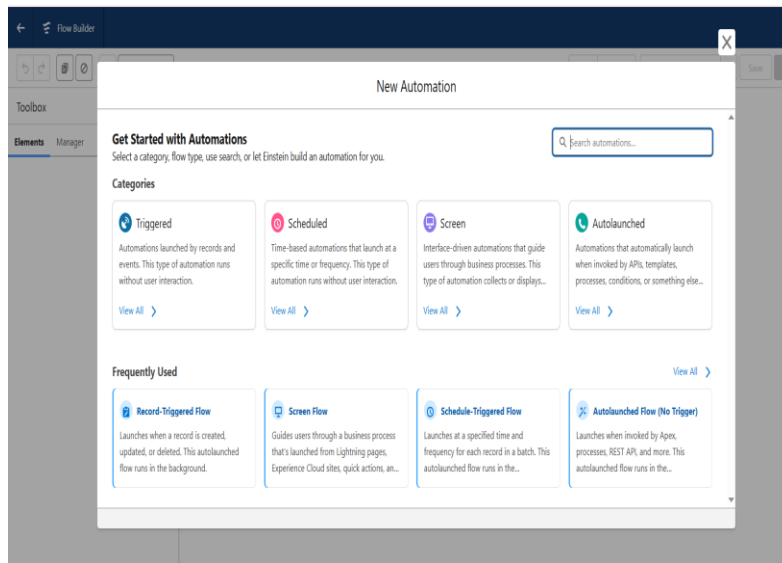
Current Assignments

Add Assignment

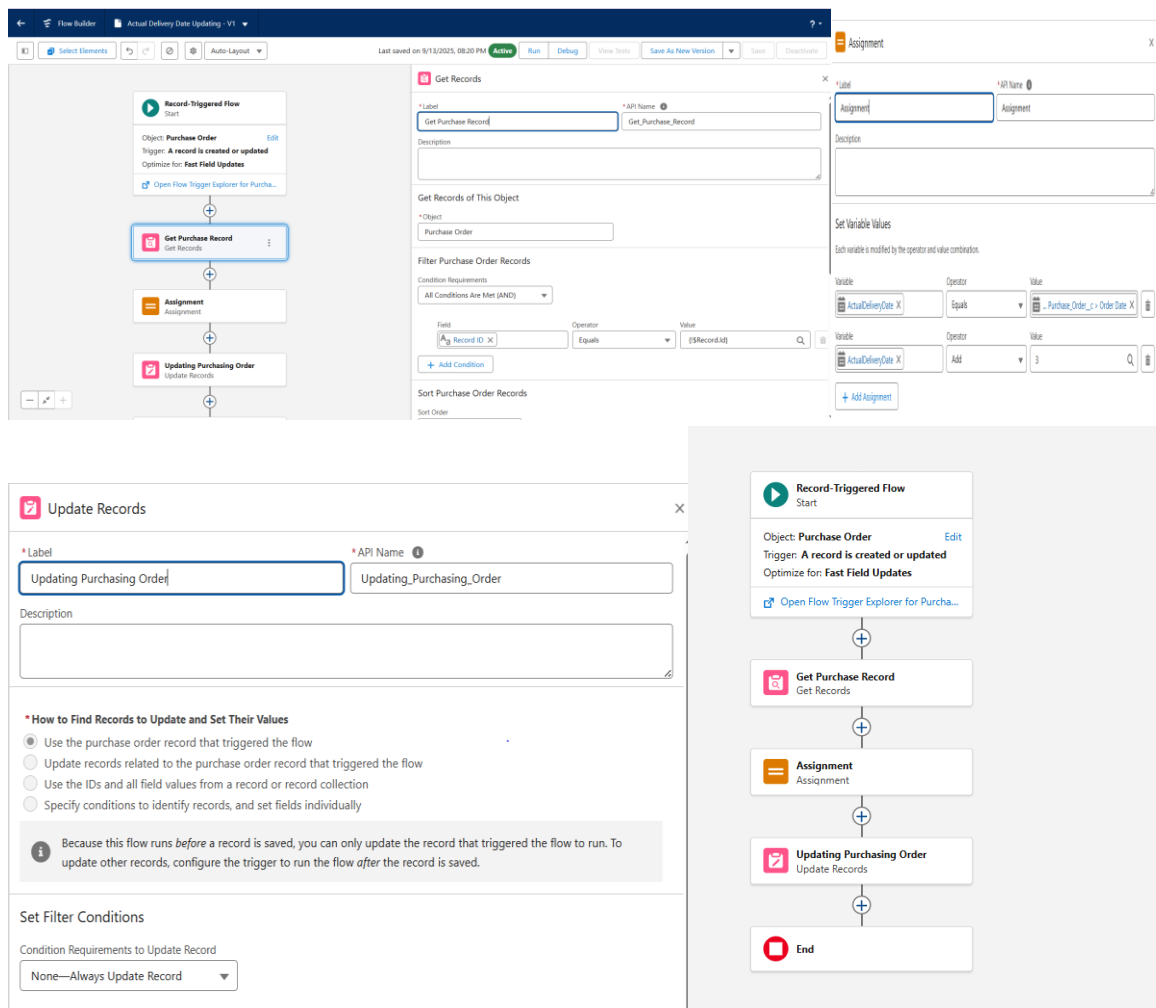
	Full Name	Active	Role	Profile	User License	Expires On
<input type="checkbox"/>	Suyabharathi P	<input checked="" type="checkbox"/>		System Administrator	Salesforce	

## 13. Flows

- Automate processes using Flows.



- Example: Auto-Update Actual Delivery Date = Order Date + 3 days.



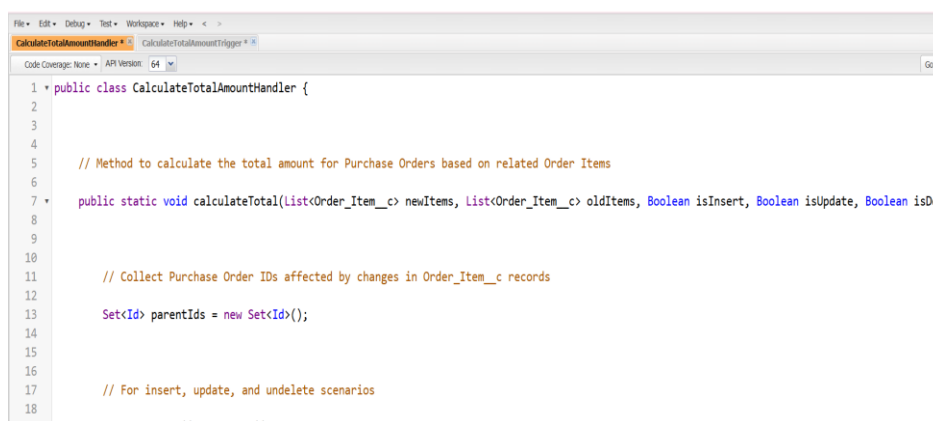
## 14. Triggers

- Use Apex Triggers for automation beyond Flows.



```
1 trigger CalculateTotalAmountTrigger on Order_Item__c (after insert, after update, after delete, after undelete) {
2
3     // Call the handler class to handle the logic
4
5     CalculateTotalAmountHandler.calculateTotal(trigger.new, trigger.old, trigger.isInsert, trigger.isUpdate, trigger.isDelete, trigger.isUndelete);
6
7 }
8
9
```

- Example: Trigger to calculate Total Order Cost from related Order Items and update PurchaseOrder.

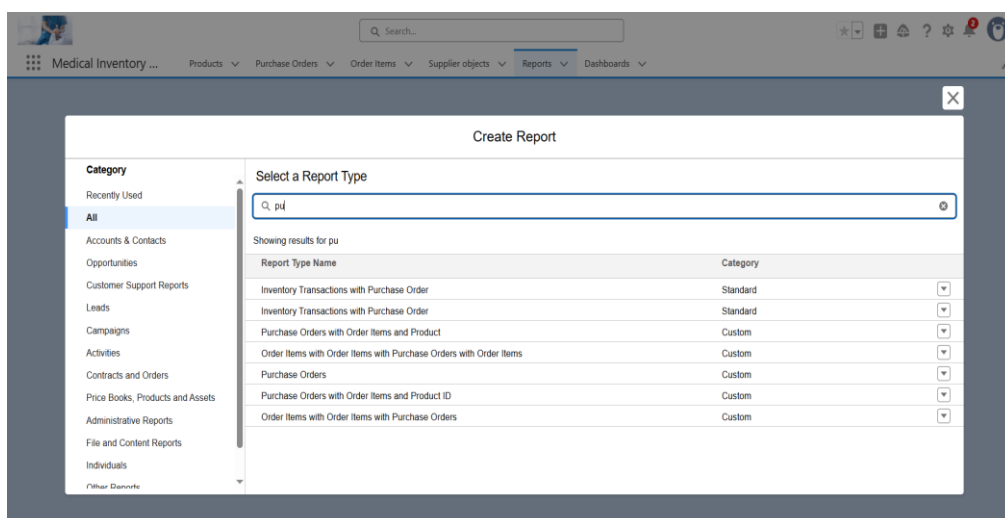


```
1 public class CalculateTotalAmountHandler {
2
3
4
5     // Method to calculate the total amount for Purchase Orders based on related Order Items
6
7     public static void calculateTotal(List<Order_Item__c> newItems, List<Order_Item__c> oldItems, Boolean isInsert, Boolean isUpdate, Boolean isDelete) {
8
9
10
11         // Collect Purchase Order IDs affected by changes in Order_Item__c records
12
13         Set<Id> parentIds = new Set<Id>();
14
15
16
17         // For insert, update, and undelete scenarios
18
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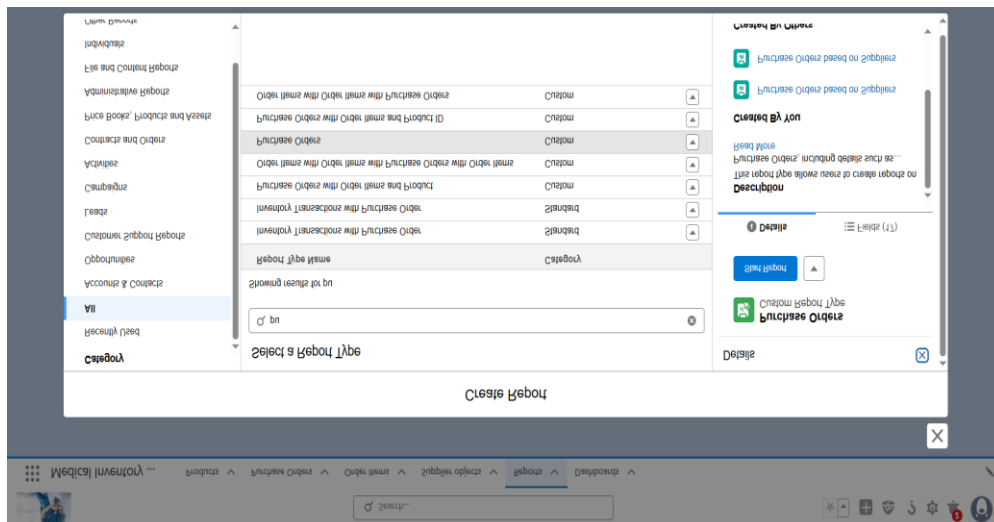
```

## 15. Reports

Purchase Orders by Supplier Report – Group by Supplier ID, show Total Order Cost.







- Complete Purchase Details Report – Show Supplier, Purchase Order, Products, Quantity, Amount.

Medical Inventory ... Products Purchase Orders Order Items Supplier objects Reports Dashboards

Search...

Report: Purchase Orders  
**Purchase Orders based on Suppliers**

Enable Field Editing Q Add Chart Edit

Total Records: 6 Total Total Order Cost: \$10,000 Total Order Count: 0

Supplier ID: Supplier objects Name	Purchase Order ID	Purchase Order Name	Total Order Cost	Order Count
Recruiter (6)	a01g1.00000NbnK (1)	Initial Review	\$2,000	0
	a01g1.00000NnPGc (1)	Initial Review	\$1,000	0
	a01g1.00000NnRWv (1)	Recruiter	\$1,000	0
	a01g1.00000NnWZ (1)	Recruiter	\$2,000	0
	a01g1.00000NnXMD (1)	Recruiter	\$2,000	0
	a01g1.00000NnmsQ (1)	Recruiter	\$2,000	0
<b>Total (6)</b>			<b>\$10,000</b>	<b>0</b>

Medical Inventory ... Products Purchase Orders Order Items Supplier objects Reports Dashboards

Search...

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

Enable Field Editing Q Add Chart Edit

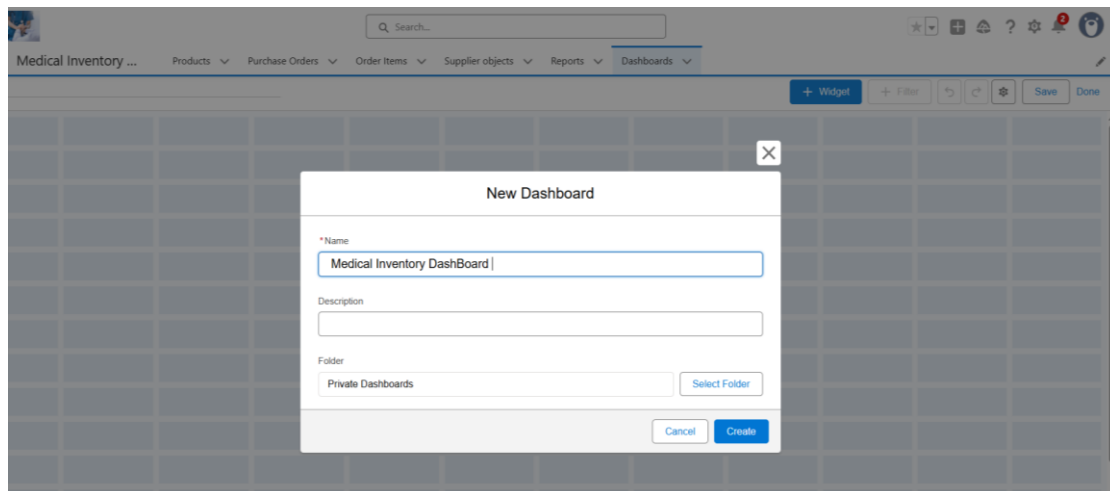
Total Records: 6

Supplier ID: Supplier objects Name	Total Order Cost	Purchase Order ID	Product ID	Expected Delivery Date	Purchase Order Name
Recruiter (6)	\$1,000 (2)	a01g1.00000NnPGc (1)	-	9/24/2025	Initial Review
		Subtotal			
		a01g1.00000NnRWv (1)	-	9/14/2025	Recruiter
		Subtotal			
	\$2,000 (4)	a01g1.00000NbnK (1)	-	9/23/2025	Initial Review
		Subtotal			
		a01g1.00000NnWZ (1)	-	10/1/2025	Recruiter
		Subtotal			
		a01g1.00000NnXMD (1)	-	9/20/2025	Recruiter
		Subtotal			
		a01g1.00000NnmsQ (1)	-	9/13/2025	Recruiter
		Subtotal			
<b>Subtotal</b>					

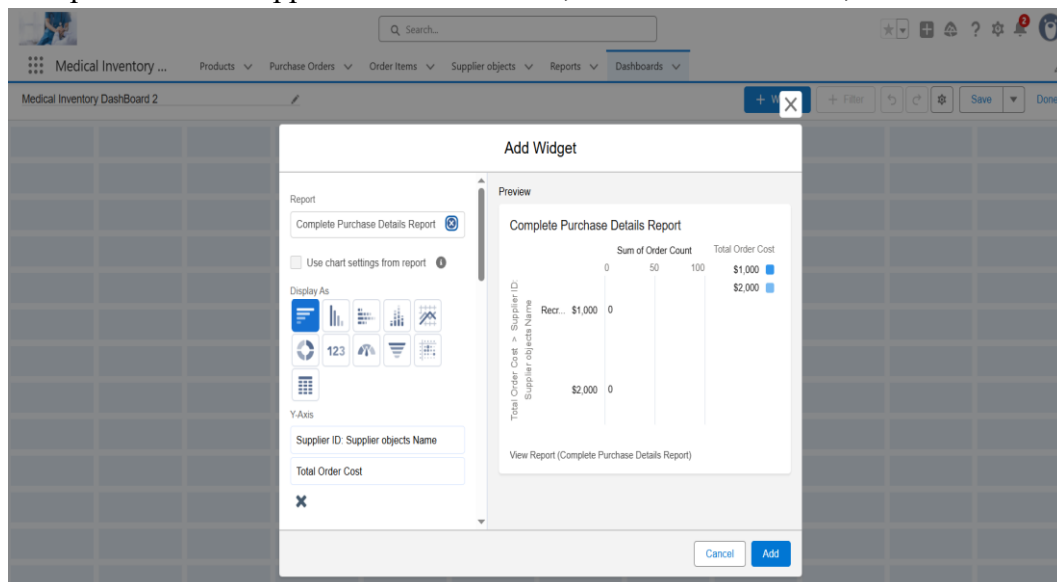
Row Counts Detail Rows Subtotals Grand Total

## 16. Dashboards

- Create Medical Inventory Dashboard.



- Components: Supplier-wise Orders, Stock Status, Total Costs.





## Conclusion

The **Medical Inventory Management System** developed on Salesforce successfully demonstrates how CRM platforms can be leveraged to manage real-time inventory operations in the medical field. By creating **custom objects, fields, validation rules, flows, triggers, reports, and dashboards**, the project ensures accurate tracking of suppliers, products, purchase orders, and inventory transactions.

### Project Achievements:

- Created a streamlined system for supplier and purchase order management.
- Automated order tracking and product stock updates using Flows and Triggers.
- Implemented strong security using Profiles, Roles, and Permission Sets.
- Generated real-time insights through Reports and Dashboards.

### Student Learning Outcomes:

- Hands-on Salesforce CRM skills in a real-time use case.
- Ability to design custom objects, automation, and security models.
- Improved teamwork and collaboration in managing project lifecycle.
- Exposure to industry practices in CRM and inventory management.

### Future Scope:

- Integration with barcode scanners for product entry.
- Mobile App support for order approvals and supplier management.
- Advanced AI-driven demand forecasting and stock optimization.
- Multi-branch scalability for large healthcare organizations.