

# **Medical Inventory Management**

**College Name:** Shree Venkateshwara Arts and Science College  
(SVASC)gobi

**College Code:** BRUBD

## **TEAM DETAILS**

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# Medical Inventory Management Project – Summary

The **Medical Inventory Management System** is designed to streamline the tracking, ordering, and management of medical products and supplies in a healthcare setup. It ensures accurate stock monitoring, efficient purchasing, and role-based access for smooth operations.

## Key Objects

### 1. Product

- Stores details of medical supplies (name, category, quantity, unit price, expiry date, supplier).
- Helps track available stock and low-inventory alerts.

### 2. Purchase Order

- Represents bulk orders placed with suppliers.
- Tracks order date, supplier, status (pending, received).

### 3. Order Item

- Line items linked to a purchase order.
- Includes product name, quantity, and cost.

## Roles

- **Admin:** Full access (setup, roles, reports, dashboards).
- **Purchase Manager:** Creates purchase orders, approves requests, manages suppliers.

## Automation (Triggers & Flows)

- **Triggers:**

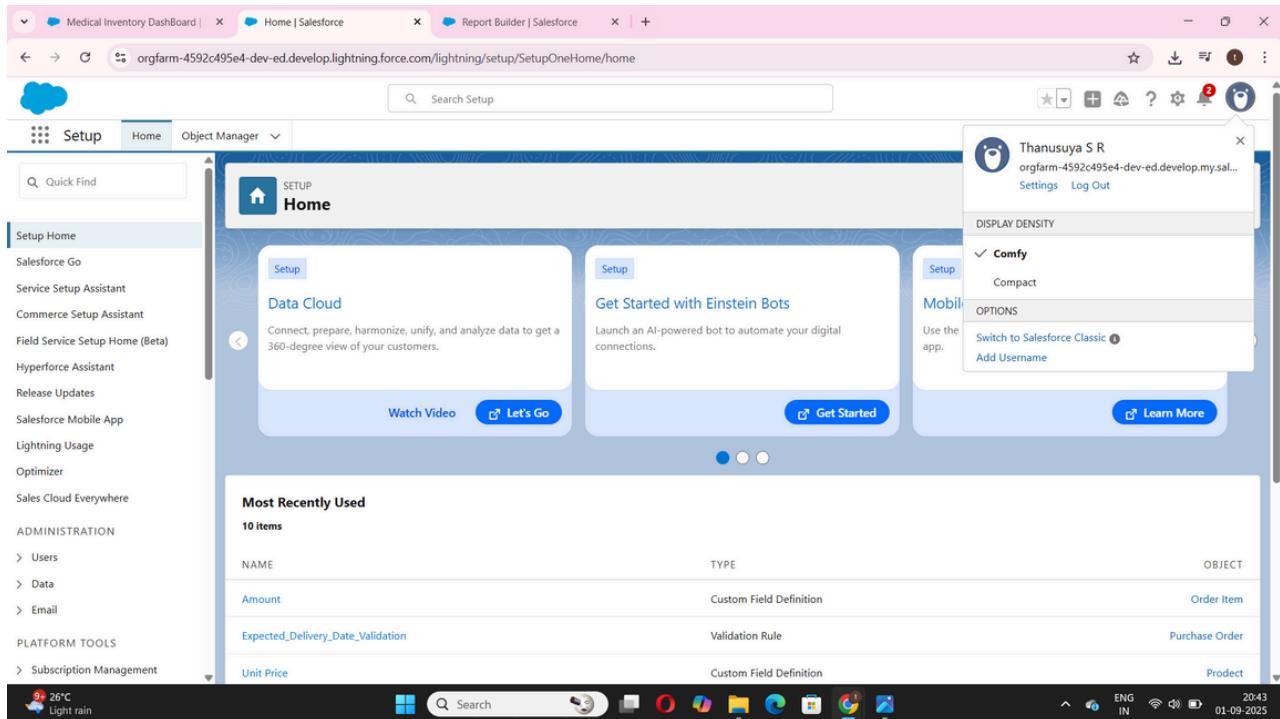
- Auto-update stock levels when an order is received.
- Send alerts for low-stock or near-expiry products.

- **Flows:**
  - Approval flow for purchase orders (Staff → Manager → Admin).
  - Notification flow to managers when stock falls below threshold.
- **Reports**
  - Stock Availability Report (current inventory by product).
  - Purchase History Report (orders by date, supplier, status).
  - Expiry Report (items nearing expiry).
  - Cost Analysis Report (spend tracking on suppliers).

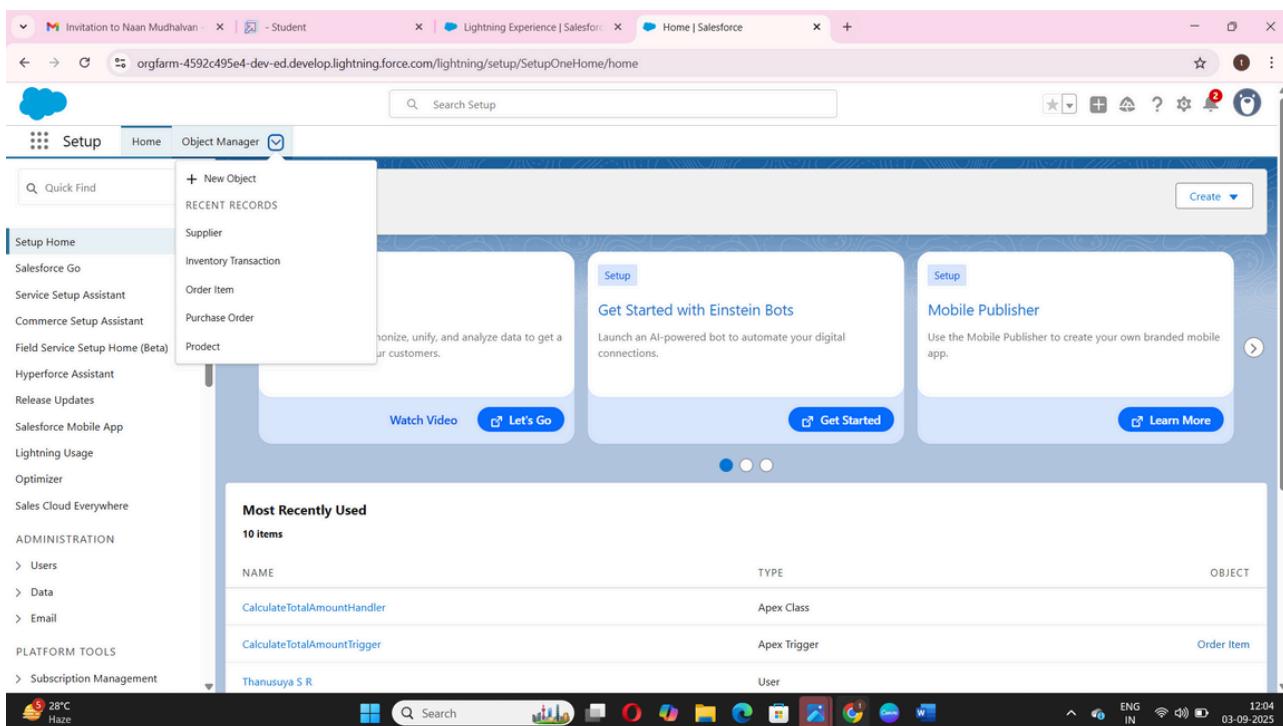
## Dashboard

- Real-time stock summary (available vs. required).
- Pending purchase orders overview.
- Top suppliers and expenditure breakdown.
- Alerts for low stock and expiring items.

# Medical Inventory Management-(project overview)



**Account:** We had created salesforce account.( **Milestone 1- Salesforce Account**) Completed.



**Objects and fields(Milestone 2- Objects)- (Milestone 5- fields)**

We created the objects “*Products, Purchase Order, Order Item, Inventory Transaction and Supplier objects*”.

Setup > OBJECT MANAGER  
Product

**Fields & Relationships**  
12 Items, Sorted by Field Label

Current Stock Level	Current_Stock_Level__c	Number(18, 0)	
Expiry Date	Expiry_Date__c	Date	
Last Modified By	LastModifiedByld	Lookup(User)	
Minimum Stock Level	Minimum_Stock_Level__c	Number(18, 0)	
Owner	OwnerId	Lookup(User,Group)	✓
Product Name	Product__c	Text(255)	
Product_ID	Name	Text(80)	
Product Description	Product_Description__c	Text Area(255)	
Product ID	Product_ID__c	Text(18)	
Product Name	Product_Name__c	Text(255)	

From “Object Manager” we created “Product object” and created its field’s and relationships Creating a Product Object completed. Created product objects fields are (“*Product ID(Standard), Product Name, Product Description, Minimum Stock Level, Current Stock Level, Unit Price, Expiry Date*”).

Setup > OBJECT MANAGER  
Purchase Order

**Fields & Relationships**  
10 Items, Sorted by Field Label

Actual Delivery Date	Actual_Delivery_Date__c	Date	
Created By	CreatedByld	Lookup(User)	
Expected Delivery Date	Expected_Delivery_Date__c	Date	
Last Modified By	LastModifiedByld	Lookup(User)	
Order Count	Order_Count__c	Roll-Up Summary (COUNT Order Item)	
Order Date	Order_Date__c	Date	
Owner	OwnerId	Lookup(User,Group)	✓
Purchase Order ID	Name	Text(80)	✓
Supplier ID	Supplier_ID__c	Lookup(Supplier)	✓
Total Order Cost	Total_Order_Cost__c	Currency(16, 2)	

Created **fields** for the object **Purchase Order** are *Purchase Order ID, Supplier ID, Order Date, Expected Delivery Date, Actual Delivery Date , Order count,Total Order Cost.*

SETUP > OBJECT MANAGER  
Order Item

**Fields & Relationships**  
9 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Amount	Amount__c	Currency(18, 0)		
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Order Item ID	Order_Item_ID__c	Text(255)		
Order Item ID	Name	Text(80)		✓
Product ID	Product_ID__c	Lookup(Product)		✓
Purchase Order ID	Purchase_Order_ID__c	Master-Detail(Purchase Order)		✓
Quantity Ordered	Quantity_Ordered__c	Number(18, 0)		
Quantity Received	Quantity_Received__c	Number(18, 0)		

We created object **Order Item** with required field "Order Item ID, Product ID, Purchase Order ID, Quantity Ordered, Quantity Received, Unit Price, Amount".

SETUP > OBJECT MANAGER  
Inventory Transaction

**Fields & Relationships**  
8 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)		
Owner	OwnerId	Lookup(User,Group)		✓
Purchase Order ID	Purchase_Order_ID__c	Lookup(Purchase Order)		✓
Transaction Date	Transaction_Date__c	Date		
Transaction ID	Transaction_ID__c	Text(255)		
Transaction Type	Transaction_Type__c	Picklist		

We created object Inventory Transaction with required field “Transaction ID,Purchase Order ID,Transaction Date,Transaction Type,Total Order Cost”.

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

- Header: Search Setup, Home, Object Manager
- Breadcrumb: SETUP > OBJECT MANAGER
- Page Title: Supplier
- Left sidebar (Details):
  - Fields & Relationships (selected)
  - 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
- Main Content: Fields & Relationships table
| FIELD LABEL | FIELD NAME | DATA TYPE | CONTROLLING FIELD | INDEXED |
| --- | --- | --- | --- | --- |
| Address | Address\_c | Text Area(255) |  |  |
| Contact Person | Contact\_Person\_c | Text(18) |  |  |
| Created By | CreatedById | 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) |  | ✓ |
| Supplier Name | Supplier\_Name\_c | Text(255) |  |  |

We created object **Supplier** with required field “*Supplier ID,Supplier Name,Contact Person,Phone Number,Email,Address*”.

We had compleated object creation Milestone2-Object and their fields creation Milestone5-Fields.

## Creating tabs for Object Milestone 3

We had created tabs for **Milestone 3- Tabs**

Tabs are a fundamental part of the Salesforce interface, providing a way to navigate to different objects and records.

**Custom Tabs**

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

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

Action	Label	Tab Style	Description
Edit   Del	Inventory Transactions	Alarm clock	
Edit   Del	Order Items	Airplane	
Edit   Del	Products	Airplane	
Edit   Del	Purchase Orders	Airplane	
Edit   Del	Suppliers	Alarm clock	

**Web Tabs**

No Web Tabs have been defined

**Visualforce Tabs**

No Visualforce Tabs have been defined

We have created tabs for objects “*Product, Purchase Order, Order Item, Inventory Transaction, Supplier*”.

## Lightning App for Medical Inventory Management Milestone 4

**Lightning Experience App Manager**

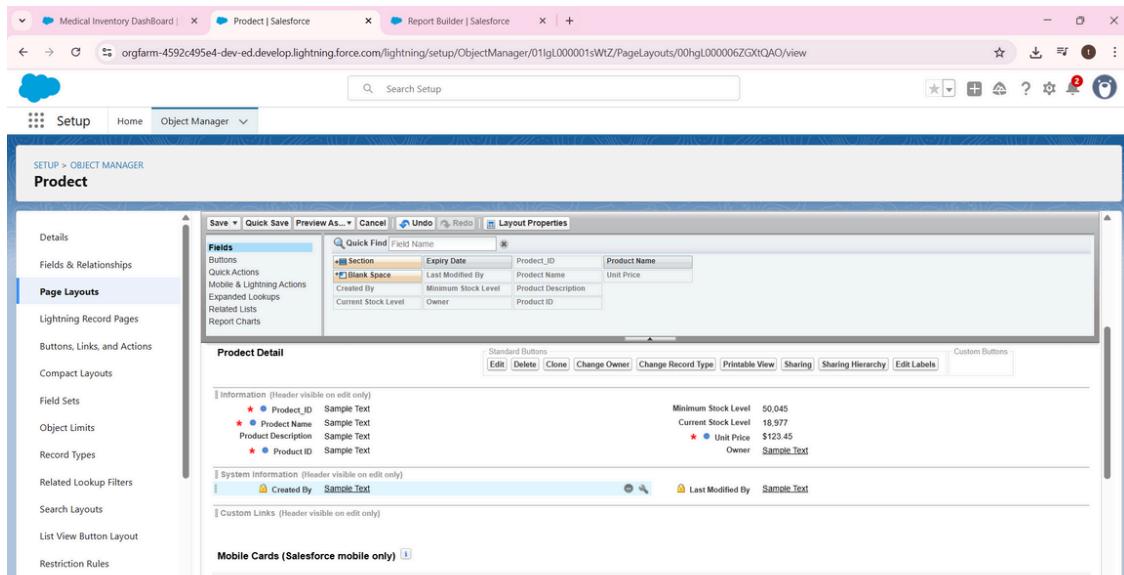
28 items • Sorted by App Name • Filtered by All appmenuitems - TabSet Type, App Type

App Name ↑	Developer Name	Description	Last Modified ...	Ap... ↓	Vi... ↓
Data Cloud	Audiences@ou	Build a thorough and complete understanding of your customers.	6/26/2025, 10:15 A...	Lightning	✓
10 Data Manager	DataManager	Use Data Manager to view limits, monitor usage, and manage recipes.	6/26/2025, 10:15 A...	Lightning	✓
11 Digital Experiences	SalesforceCMS	Manage content and media for all of your sites.	6/26/2025, 10:15 A...	Lightning	✓
12 Lightning Usage App	LightningInstrumentation	View Adoption and Usage Metrics for Lightning Experience	6/26/2025, 10:15 A...	Lightning	✓
13 Marketing CRM Classic	Marketing	Track sales and marketing efforts with CRM objects.	6/26/2025, 10:15 A...	Classic	✓
14 Medical Inventory Management	Medical_Inventory_Manageme...	Medical Inventory Management	8/31/2025, 1:18 AM	Lightning	✓
15 My Service Journey	MSIApp	Discover new customer service capabilities.	6/26/2025, 10:15 A...	Lightning	✓
16 Platform	Platform	The fundamental Lightning Platform	6/26/2025, 10:15 A...	Classic	✓
17 Queue Management	QueueManagement	Create and manage queues for your business.	6/26/2025, 10:15 A...	Lightning	✓
18 Sales	Sales	The world's most popular sales force automation (SFA) solution	6/26/2025, 10:15 A...	Classic	✓
19 Sales	LightningSales	Manage your sales process with accounts, leads, opportunities, and more	6/26/2025, 10:15 A...	Lightning	✓
20 Sales Cloud Mobile	SalesCloudMobile	New seller focused mobile first experience	6/26/2025, 10:15 A...	Lightning	✓
21 Sales Console	LightningSalesConsole	(Lightning Experience) Lets sales reps work with multiple records on one scre...	6/26/2025, 10:15 A...	Lightning	✓

We had created Lightning App for Medical Inventory Management with Available Items, selected “Products, Purchase Orders, Order Items, Inventory Transactions, Suppliers, Reports, and Dashboard”. And also from Available Profiles we select System Administrator and move it to Selected Profiles.

We had compleated Milestone 4

## Editing of Page Layouts-Milestone 6



We had edited Page Layout in Product Object.

Same like as we edited page layouts for object Purchase Order, Purchase Order, Inventory Transaction, Supplier.

We had compleated Milestone 6

# We had edited Page Layout in Purchase order Object.

The screenshot shows the Salesforce Setup interface for the Purchase Order object. The left sidebar lists various configuration 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, Restriction Rules, and Scoping Rules. The 'Page Layouts' tab is selected. The main area displays the 'Purchase Order Detail' page layout. It includes sections for 'Information' (with fields like Purchase Order ID, Supplier ID, Order Date, Expected Delivery Date, Order Count, Actual Delivery Date, Total Order Cost, Order Status, and Order Type), 'System Information' (Created By, Last Modified By), and 'Custom Links'. A 'Fields' panel on the left lists Buttons, Quick Actions, Mobile & Lightning Actions, Expanded Lookups, Related Lists, and Report Charts. A 'Layout Properties' bar at the top provides standard buttons for Save, Undo, Redo, and Layout Properties.

# We had edited Page Layout in Order items Object.

The screenshot shows the Salesforce Setup interface for the Order Item object. The left sidebar lists various configuration 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, Restriction Rules, and Scoping Rules. The 'Page Layouts' tab is selected. The main area displays the 'Order Item Detail' page layout. It includes sections for 'Information' (with fields like Order Item ID, Order Item Name, Product ID, Amount, Purchase Order ID, Quantity Ordered, and Quantity Received), 'System Information' (Created By, Last Modified By), and 'Custom Links'. A 'Fields' panel on the left lists Buttons, Quick Actions, Mobile & Lightning Actions, Expanded Lookups, Related Lists, and Report Charts. A 'Layout Properties' bar at the top provides standard buttons for Save, Undo, Redo, and Layout Properties.

# We had edited Page Layout in Inventory Transaction Object.

The screenshot shows the Salesforce Setup interface for the 'Inventory Transaction' object. The left sidebar lists various configuration options like Details, Fields & Relationships, Page Layouts, and Lightning Record Pages. The 'Page Layouts' section is currently selected. The main area displays the 'Layout Properties' for the 'Inventory Transaction Detail' page layout. The 'Fields' section contains a table with columns for Field Name and Type. A 'Salesforce Mobile and Lightning Experience Actions' section follows, containing a note about overriding predefined actions. Below that is the 'Inventory Transaction Detail' section, which includes fields for Transaction ID, Transaction Type, Purchase Order ID, and Transaction Date, along with standard buttons for Edit, Delete, Clone, etc.

# We had edited Page Layout in Supplier Object.

The screenshot shows the Salesforce Setup interface for the 'Supplier' object. The left sidebar lists various configuration options like Details, Fields & Relationships, Page Layouts, and Lightning Record Pages. The 'Page Layouts' section is currently selected. The main area displays the 'Layout Properties' for the 'Supplier Detail' page layout. The 'Fields' section contains a table with columns for Field Name and Type. The 'Supplier Detail' section includes fields for Supplier ID, Supplier Name, Contact Person, Address, Email, Last Modified By, Phone Number, and Owner, along with standard buttons for Edit, Delete, Clone, etc. A 'Mobile Cards (Salesforce mobile only)' section is also present at the bottom.

# Compact Layouts-Milestone 7

Created a Compact Layout to a Product Object

The screenshot shows the Salesforce Setup interface under the Object Manager section for the 'Product' object. On the left, a sidebar lists various layout-related options like Details, Fields & Relationships, Page Layouts, and Compact Layouts. The 'Compact Layouts' option is selected. In the main content area, a new compact layout is being created with the label 'Product Compact Layout' and API name 'Product\_Compact\_Layout'. The included fields are set to 'Product Name', 'Unit Price', and 'Current Stock Level'. The object name is 'Product'. The layout was created by 'Thanusuya S.R.' on 8/31/2025, 4:47 AM, and modified by the same user on the same date and time.

Selected the Compact Layout Fields as Product name, Unit Price, Current Stock Level.

Created a Compact Layout to a Purchase Order Object

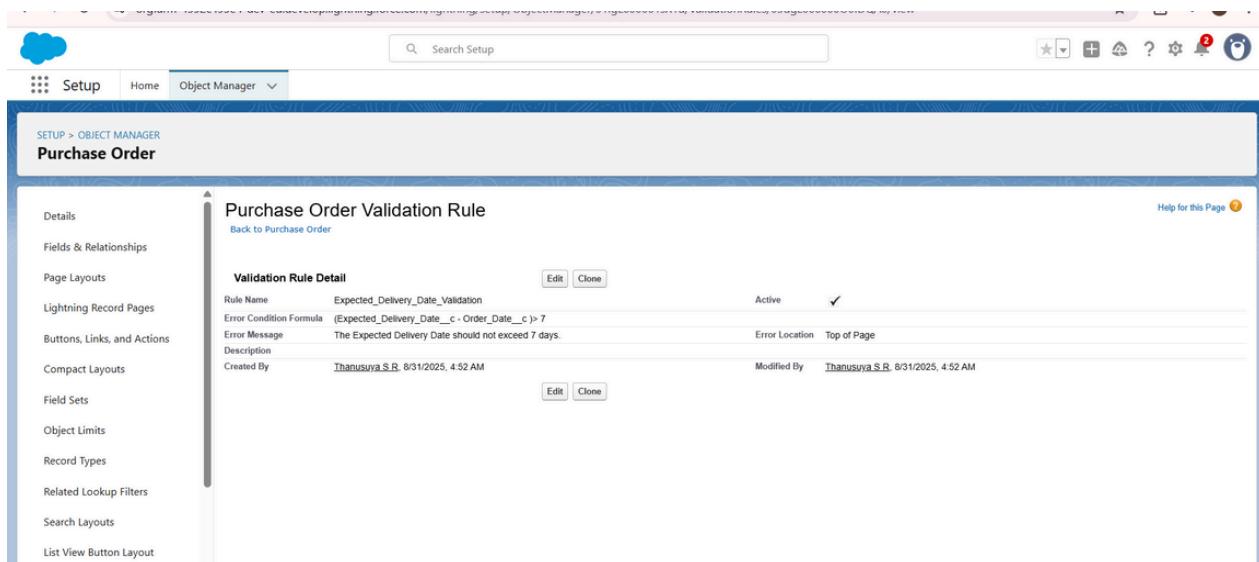
The screenshot shows the Salesforce Setup interface under the Object Manager section for the 'Purchase Order' object. Similar to the previous screenshot, it shows a new compact layout named 'Purchase Order Compact Layout' with API name 'Purchase\_Order\_Compact\_Layout'. The included fields are 'Purchase Order ID', 'Order Date', 'Total Order Cost', and 'Supplier ID'. The object name is 'Purchase Order'. This layout was also created by 'Thanusuya S.R.' on 8/31/2025, 4:50 AM.

Selected the Compact Layout Fields as Purchase Order ID, Order Date, Total Order Cost, Supplier ID.

## Validation Rules-Milestone 8

Validation rules in Salesforce are used to ensure data integrity by preventing users from saving invalid data in records.

Created an Expected Delivery Date Validation rule to a Employee Object



Inserted the Error Condition Formula as :  
(Expected\_Delivery\_Date\_\_c - Order\_Date\_\_c )> 7

The Error Message as “The Expected Delivery Date should not exceed 7 days.”

Selected the Error location as Top of Page.

Compleated Milestone 8



# Profiles Milestone-9

Profiles control a user's permissions to objects, fields, tabs, apps, and other settings.

## Created an Inventory Manager Profile

The screenshot shows the Salesforce Setup interface with the 'Profiles' page selected. The profile being created is named 'Inventory Manager'. The 'Profile Detail' section shows the name, user license (Salesforce), and description ('Inventory Manager'). The 'Page Layouts' section lists various standard object layouts assigned to the profile, such as Global Layout, Not Assigned, Home Page Default, Account Layout, and Alternative Payment Method Layout. The 'Custom Profile' checkbox is checked. The 'Modified By' field shows 'Thanusuya\_S.B.' with a timestamp of '9/1/2025, 7:27 AM'.

We had created Inventory Manager Profile ,Selected the Custom App settings as default for the Medical Inventory Management.

The screenshot shows the 'Custom App Settings' section of the 'Inventory Manager' profile. It lists various standard and custom applications along with their visibility and default status. Applications include All Tabs, Analytics Studio, App Launcher, Approvals, Automation, Bolt Solutions, Community, Content, Data Cloud, Data Manager, Digital Experiences, Lightning Usage App, Marketing CRM Classic, Medical Inventory Management, and My Service Journey. The 'Sales' application is marked as both visible and the default. Other applications like Queue Management, Sales Cloud Mobile, and Service are also listed with their respective settings.

Hyperforce Assistant

- Users
  - Profiles**
- Data
  - Mass Transfer Approval Requests
- Feature Settings
  - Approval Settings
- Data.com
  - Prospector Preferences
  - Prospector Users
  - Functions
- Marketing
  - Lead Processes
- Sales
  - Products
    - Asset Settings

Profiles

SETUP Profiles

Custom Object Permissions

Object	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	✓	✓	✓	✓	✓	✓	✓							
Order Items	✓	✓	✓	✓	✓	✓	✓							
Products	✓	✓	✓	✓	✓	✓	✓							

Purchase Orders

Suppliers

Session Settings

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login

Password Policies

User passwords expire in	Never expires
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
Obfuscate secret answer for password resets	<input type="checkbox"/>
Require a minimum 1 day password lifetime	<input type="checkbox"/>

1. User passwords expire in should be “ never expires ”.
2. Minimum password length should be “ 8 ”.

## Created an Purchase Manager Profile

Q\_prof

SETUP Profiles

Profile

**Purchase Manager**

Help for this Page

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

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

Login IP Ranges [0] | Enabled Apex Class Access [0] | Enabled Visualforce Page Access [0] | Enabled External Data Source Access [0] | Enabled Named Credential Access [0] | Enabled External Credential Principal Access [0] | Enabled Custom Metadata Type Access [0] | Enabled Custom Setting Definitions Access [0] | Enabled Flow Access [0] | Enabled Service Presence Status Access [0] | Enabled Custom Permissions [0]

**Profile Detail**

Name	Purchase Manager	Edit	Clone	Delete	View Users
User License	Salesforce				Custom Profile <input checked="" type="checkbox"/>
Description					
Created By	Thanusuya S.R. 8/31/2025, 4:59 AM				Modified By <a href="#">Thanusuya S.R.</a> 9/1/2025, 7:27 AM

**Page Layouts**

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

Search Setup

SETUP Profiles

Product [ View ]

Custom App Settings

	Visible	Default		Visible	Default
All Tabs (standard__AllTabSet)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Queue Management (standard__QueueManagement)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Analytics Studio (standard__Insights)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Sales (standard__LightningSales)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
App Launcher (standard__AppLauncher)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Sales (standard__Sales)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Approvals (standard__Approvals)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Sales Cloud Mobile (standard__SalesCloudMobile)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Automation (standard__FlowsApp)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Sales Console (standard__LightningSalesConsole)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Bolt Solutions (standard__LightningBolt)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Salesforce Chatter (standard__Chatter)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Community (standard__Community)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Salesforce Scheduler Setup (standard__LightningScheduler)	<input type="checkbox"/>	<input type="checkbox"/>
Content (standard__Content)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Sample Console (standard__ServiceConsole)	<input type="checkbox"/>	<input type="checkbox"/>
Data Cloud (standard__Audience360)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Service (standard__Service)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Data Manager (standard__DataManager)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Service Console (standard__LightningService)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Digital Experiences (standard__SalesforceCMS)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Site.com (standard__Sites)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Lightning Usage App (standard__LightningInstrumentation)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Subscription Management (standard__RevenueCloudConsole)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Marketing CRM Classic (standard__Marketing)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Travel App (Travel_App)	<input type="checkbox"/>	<input type="checkbox"/>
Medical Inventory Management (Medical_Inventory_Management)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	WDC (standard__Work)	<input checked="" type="checkbox"/>	<input type="checkbox"/>

We had created **Purchase Manager Profile** ,Selected the Custom App settings as default for the Medical Inventory Management.

Search Setup

SETUP Profiles

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 checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>					
Order Items	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Products	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<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

Password Policies

User passwords expire in:	Never expires
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
Obfuscate secret answer for password resets:	<input type="checkbox"/>
Require a minimum 1 day password lifetime:	<input type="checkbox"/>
Don't immediately expire links in forgot password emails:	<input type="checkbox"/>

1. User passwords expire in should be “ never expires ”.
2. Minimum password length should be “ 8 ”.

# Roles-Milestone 10

Roles in Salesforce are used to control record-level access and define the hierarchy of an organization, determining the level of visibility and sharing of records among users.

## Create a Purchasing Manager Role.

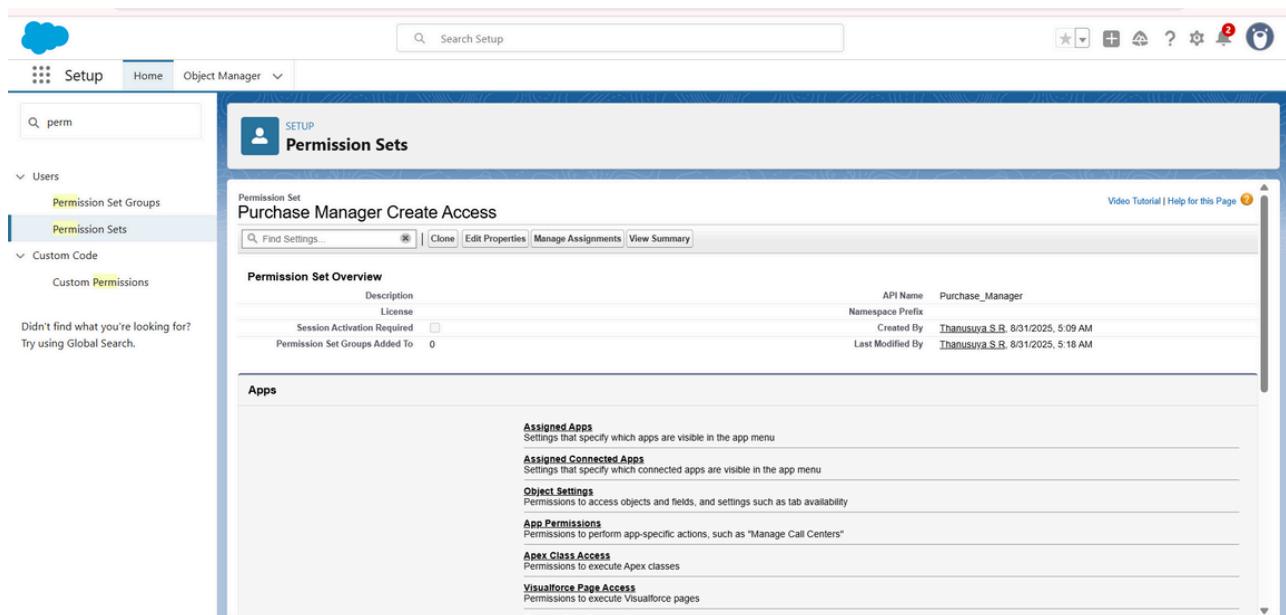
The screenshot shows the Salesforce Setup interface. The left sidebar is titled 'rol' and includes sections for 'Users' (selected), 'Feature Settings', 'Sales' (with 'Contact Roles on Contracts' and 'Contact Roles on Opportunities'), 'Service' (with 'Case Teams' and 'Case Team Roles'), and 'Case'. A search bar at the top says 'Search Setup'. The main content area is titled 'SETUP Roles' and shows a 'Role Detail' section for 'Purchasing Manager'. It lists the label 'Purchasing Manager', reporting to 'SVP\_Sales & Marketing', modified by 'Thanusuya S.R.' on 8/31/2025 at 5:06 AM. It has 'Opportunity Access' and 'Case Access'. The 'Role Name' is 'Purchasing\_Manager'. Sharing groups are listed as 'Role, Role and Internal Subordinates'. Below this is a table for 'Users in Purchasing Manager Role' which is currently empty. A help link 'Help for this Page' is in the top right.

This screenshot shows the same Salesforce Setup interface as the previous one, but for the 'Inventory Manager' role. The 'Role Detail' section shows the label 'Inventory Manager', reporting to 'SVP\_Sales & Marketing', modified by 'Thanusuya S.R.' on 8/31/2025 at 5:07 AM. It has 'Opportunity Access' and 'Case Access'. The 'Role Name' is 'Inventory\_Manager'. Sharing groups are listed as 'Role, Role and Internal Subordinates'. Below this is a table for 'Users in Inventory Manager Role' which is currently empty. A help link 'Help for this Page' is in the top right.

## Create a Inventory Manager Role

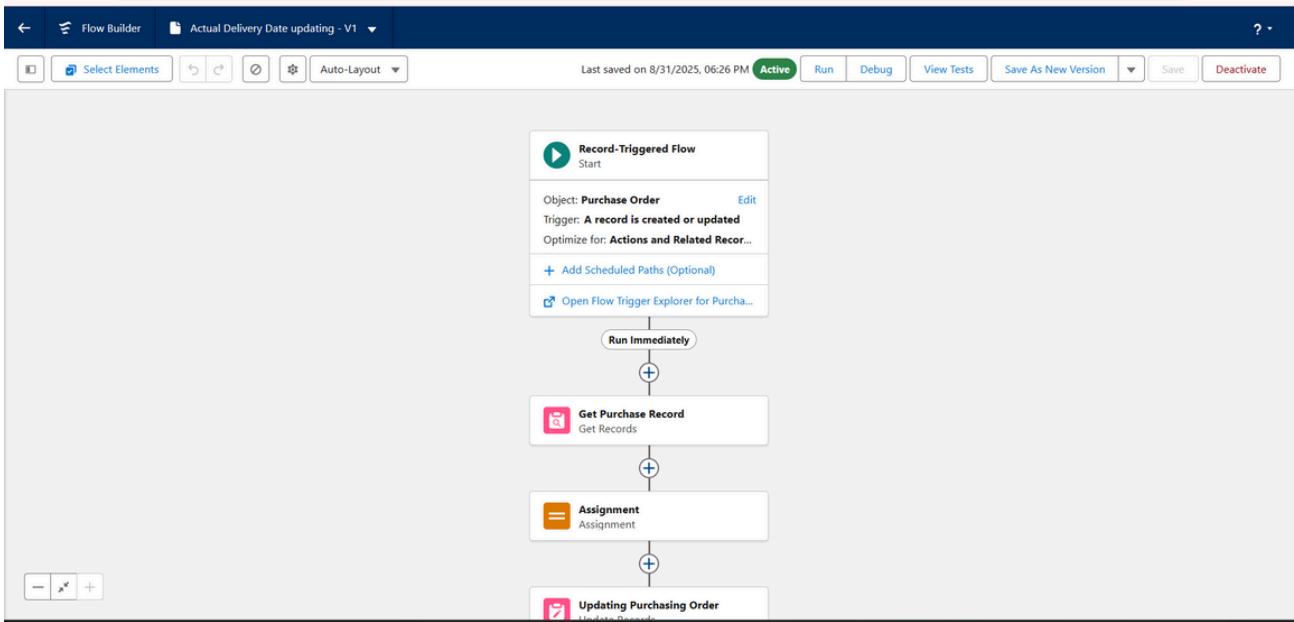
# Permission Sets Milestone-12

Permission Sets in Salesforce are a powerful tool to extend user permissions beyond what is defined in their profiles. They allow administrators to grant additional access to various tools and functions without altering the user's profile. Permission sets are particularly useful for providing specialized permissions to specific users without the need to create multiple profiles.



# Flows Milestone-13

Flows part of the Lightning Flow product, are powerful automation tools that help you collect data and perform actions in your Salesforce environment. Flows can be used to automate business processes, guide users through tasks, and integrate with external systems. They are highly versatile and can be configured to meet a wide range of business requirements without the need for custom code.



## Triggers Milestone-14

Triggers in Salesforce are pieces of Apex code that execute before or after specific data manipulation events on Salesforce records, such as insertions, updates, deletions, and undeletions.

Apex Trigger: This will open a new Apex Trigger editor 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 screenshot shows the Salesforce Apex Trigger editor with the following details:

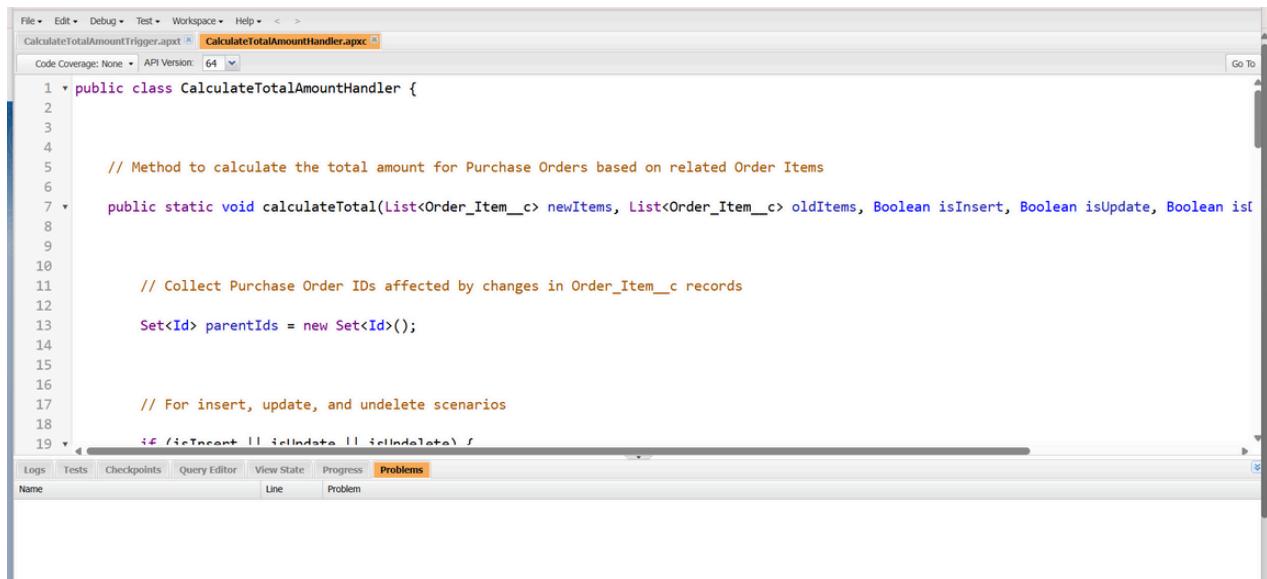
- File:** CalculateTotalAmountTrigger.apxt
- Code Coverage:** None
- API Version:** 64
- Code:**

```

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

```

## Apex Class: Name it as CalculateTotalAmountHandler



The screenshot shows the Salesforce IDE interface with the code editor open. The file is named 'CalculateTotalAmountHandler.apxc'. The code implements a class 'CalculateTotalAmountHandler' with a static method 'calculateTotal'. The method takes four parameters: a list of new items, a list of old items, and two Boolean flags for insert and update operations. It uses a set of parent IDs to collect purchase order IDs affected by changes in Order\_Item\_c records. The code is annotated with comments explaining its purpose and logic.

```
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> newItem, List<Order_Item_c> oldItem, Boolean isInsert, Boolean isUpdate, Boolean isDelete) {
7
8         // Collect Purchase Order IDs affected by changes in Order_Item_c records
9         Set<Id> parentIds = new Set<Id>();
10
11
12         // For insert, update, and undelete scenarios
13         if (isInsert || isUpdate || isDelete) {
14             for (Order_Item_c item : newItem) {
15                 parentIds.add(item.getOrderId());
16             }
17
18             for (Order_Item_c item : oldItem) {
19                 parentIds.add(item.getOrderId());
20             }
21         }
22
23         // Calculate total amount for each purchase order
24         Map<Id, Double> totalAmountMap = new Map<Id, Double>();
25
26         for (Order_Item_c item : newItem) {
27             if (parentIds.contains(item.getOrderId())) {
28                 if (totalAmountMap.containsKey(item.getOrderId())) {
29                     totalAmountMap.put(item.getOrderId(), totalAmountMap.get(item.getOrderId()) + item.getAmount());
30                 } else {
31                     totalAmountMap.put(item.getOrderId(), item.getAmount());
32                 }
33             }
34         }
35
36         for (Order_Item_c item : oldItem) {
37             if (parentIds.contains(item.getOrderId())) {
38                 if (totalAmountMap.containsKey(item.getOrderId())) {
39                     totalAmountMap.put(item.getOrderId(), totalAmountMap.get(item.getOrderId()) - item.getAmount());
40                 } else {
41                     totalAmountMap.put(item.getOrderId(), -item.getAmount());
42                 }
43             }
44         }
45
46         // Update purchase orders with calculated total amounts
47         for (Order_Item_c item : newItem) {
48             if (parentIds.contains(item.getOrderId())) {
49                 item.setTotalAmount(totalAmountMap.get(item.getOrderId()));
50             }
51         }
52
53         for (Order_Item_c item : oldItem) {
54             if (parentIds.contains(item.getOrderId())) {
55                 item.setTotalAmount(totalAmountMap.get(item.getOrderId()));
56             }
57         }
58     }
59
60 }
```

Completed Milestone-14.

## Reports Milestone-15

They allow users to create, customize, and share different types of reports based on data from standard and custom objects. Reports help organizations make informed decisions by providing insights into key metrics, trends, and performance indicators.

## Created a Purchase Orders based on Suppliers(Summary) Report

Customized our report, in group rows select – Supplier ID, Purchase Order: Purchase Order ID, for columns Order Count, Total Order Cost (In this way we are making a Summary Report).

**Purchase Orders based on Suppliers**

Total Records: 2 Total Total Order Cost: \$99,000.00

Supplier ID	Purchase Order: Purchase Order ID	Total Order Cost	Order Date
259311 (1)	979125 (1)	\$49,000.00	9/3/2025
Subtotal		\$49,000.00	
naru groups (1)	992255 (1)	\$50,000.00	9/12/2025
Subtotal		\$50,000.00	
Total (2)		\$99,000.00	

Row Counts: Detail Rows: Subtotals: Grand Total:

The above is report based on Medical inventory management

**Complete Purchase Details Report**

Total Records: 2 Total Quantity Received: 11 Total Order Count: 2 Average Order Count: 2 Total Amount: \$0 Average Amount: \$0

Supplier ID	Actual Delivery Date	Purchase Order: Purchase Order ID	Product ID: Product Name	Product ID: Product ID	Quantity Received	Order Count	Amount
259311 (2)	9/6/2025 (2)	979125 (2)	chair	01tgL000005QUXR	8	2	-
			x-ray machine	01tgL000005QVYL	3	2	-
Total (2)					11	2	\$0 Avg: \$0

Row Counts: Detail Rows: Subtotals: Grand Total:

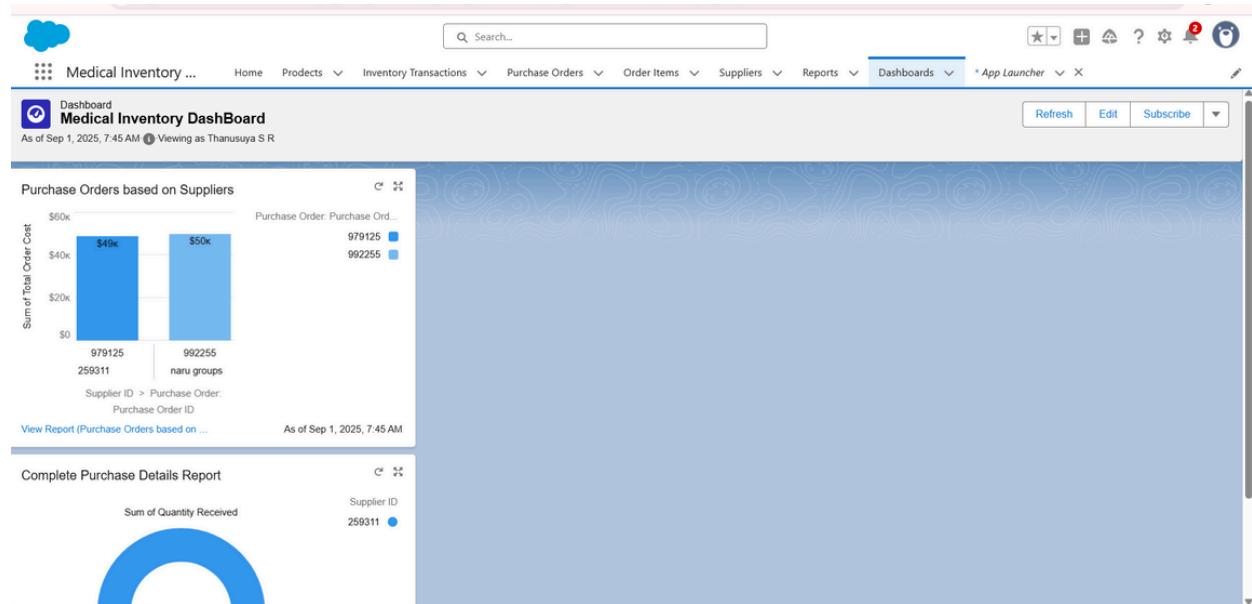
The above is report based on Medical inventory management named as Complete Purchase Details Report.

Customized our report, in group rows select – Supplier ID, Actual Delivery Date, Purchase Order: Purchase Order ID, for columns Product ID : Product ID, Product ID : Product Name, Order Count, Quantity Received, Amount (In this way we are making a Summary Report).

# Dashboards Milestone -16

Dashboards in Salesforce are dynamic visual representations of key metrics and data from reports, providing a consolidated view of organizational performance and trends. They are powerful tools for monitoring real-time data, tracking progress towards goals, and gaining actionable insights at a glance. Dashboards consist of components such as charts, tables, metrics, and gauges that display data from underlying reports

## Created Dashboard



The above dashboard details is get from **Medical inventory management .**

**THANK YOU**