MEDICAL INVENTORY MANAGEMENT

Introduction:

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.

Project Overview:

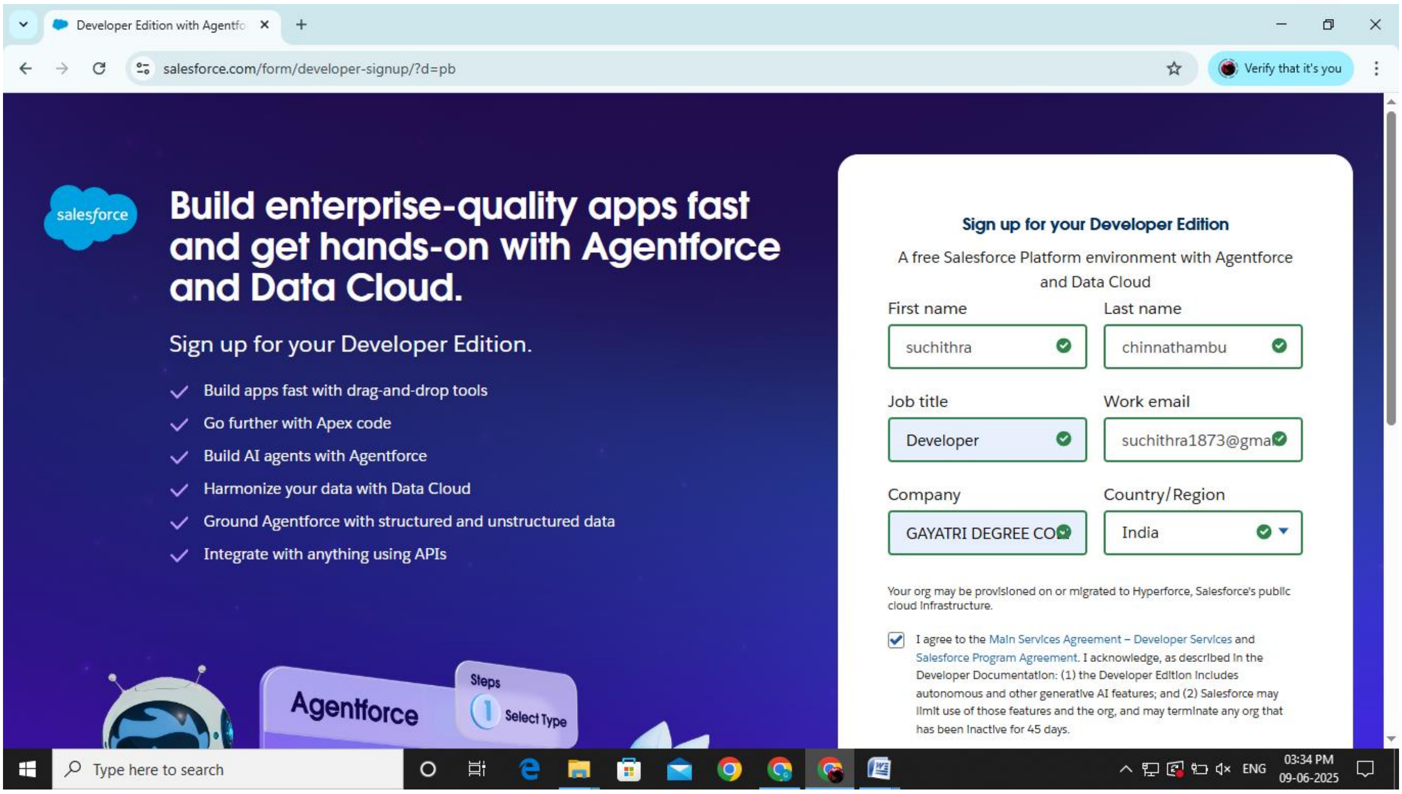
This project is a comprehensive Salesforce application to streamline and manage various operational aspects of medical inventory. The system aims to efficiently maintain supplier details, manage purchase orders, track product details and transactions, and monitor the expiry dates of products. Maintain detailed records of suppliers, including contact information. Catalog product information, including descriptions, stock levels. Monitor and track product expiry dates to avoid using expired items. Comprehensive reports to track supplier performance, and purchase orders.

MEDICAL INVENTORY MANAGEMENT
Milestone – 1

Salesforce Account

Activity 1: Creating Developer Account

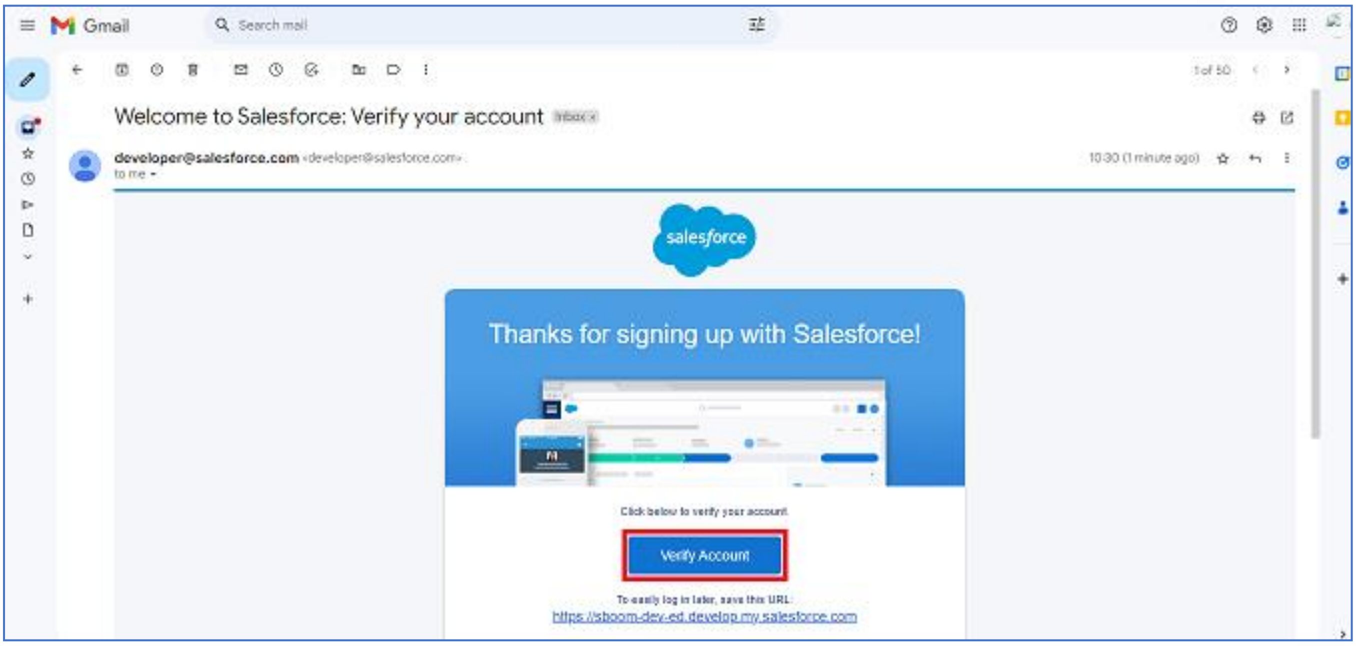
1. Creating a developer org in salesforce.
2. Go to https://developer.salesforce.com/signup
3. On the sign up form, enter the following details :
    - First name : SUCHITHRA
    - Last name : CHINNATHAMBU
    - Job Title : Developer
    - Work Email : suchithra1873@gmail.com
    - Company : GAYATRI DEGREE COLLEGE TIRUPATI
    - Country/ Region : INDIA



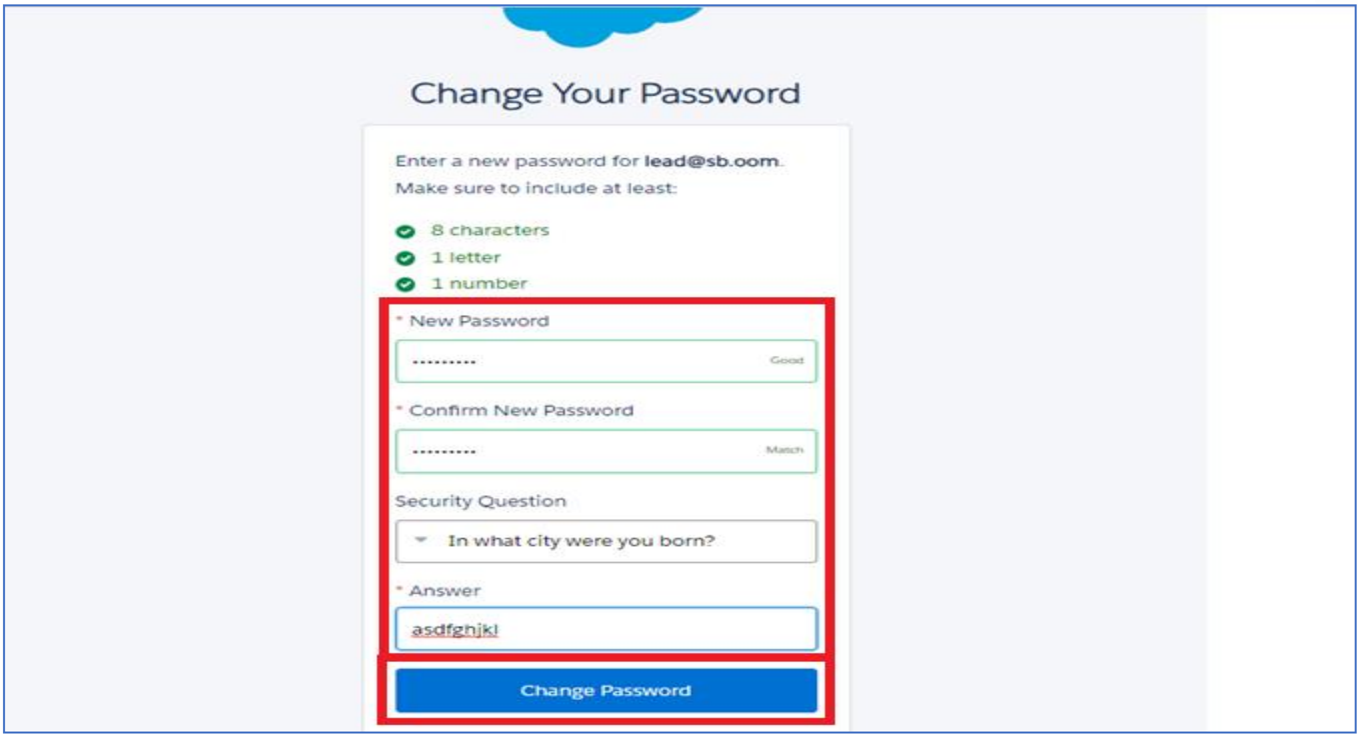
4. Click on sign me up after filling these.

Activity 2: Account Activation

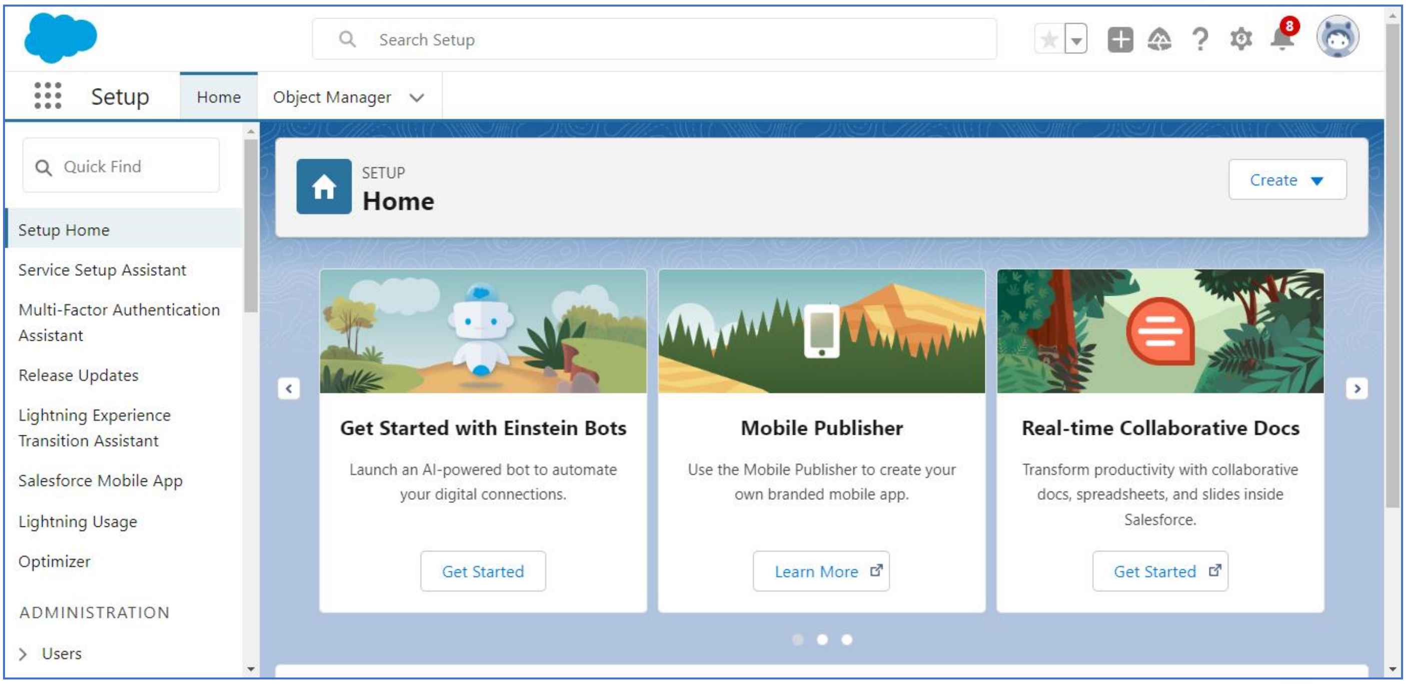
1. Go to the inbox of the email that you used while signing up. Click on the verify account to activate your account. The email may take 5-10mins.



2. Click on Verify Account
3. Give a password and answer a security question and click on change password.



4. Then you will redirect to your salesforce setup page.



Search Setup
Setup
Home
Object Manager
Quick Find
Setup Home
Service Setup Assistant
Multi-Factor Authentication Assistant
Release Updates
Lightning Experience Transition Assistant
Salesforce Mobile App
Lightning Usage
Optimizer
ADMINISTRATION
Users
SETUP
Home
Create
Get Started with Einstein Bots
Launch an AI-powered bot to automate your digital connections.
Get Started
Mobile Publisher
Use the Mobile Publisher to create your own branded mobile app.
Learn More
Real-time Collaborative Docs
Transform productivity with collaborative docs, spreadsheets, and slides inside Salesforce.
Get Started

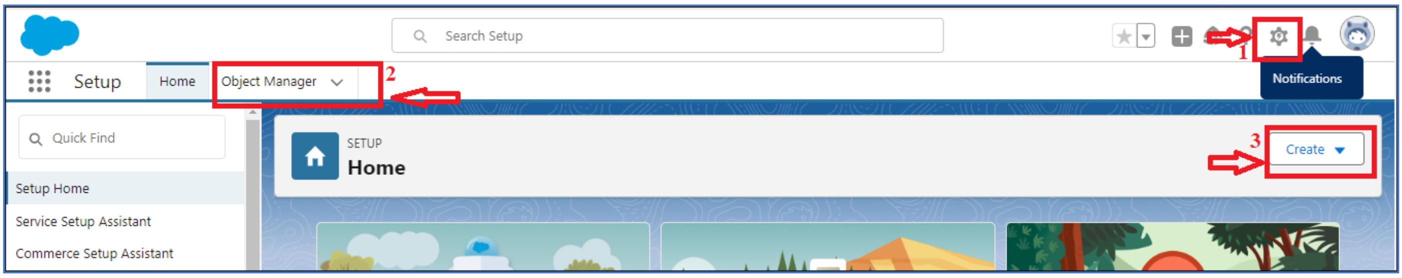
MEDICAL INVENTORY MANAGEMENT
Milestone 2

Objects Creation

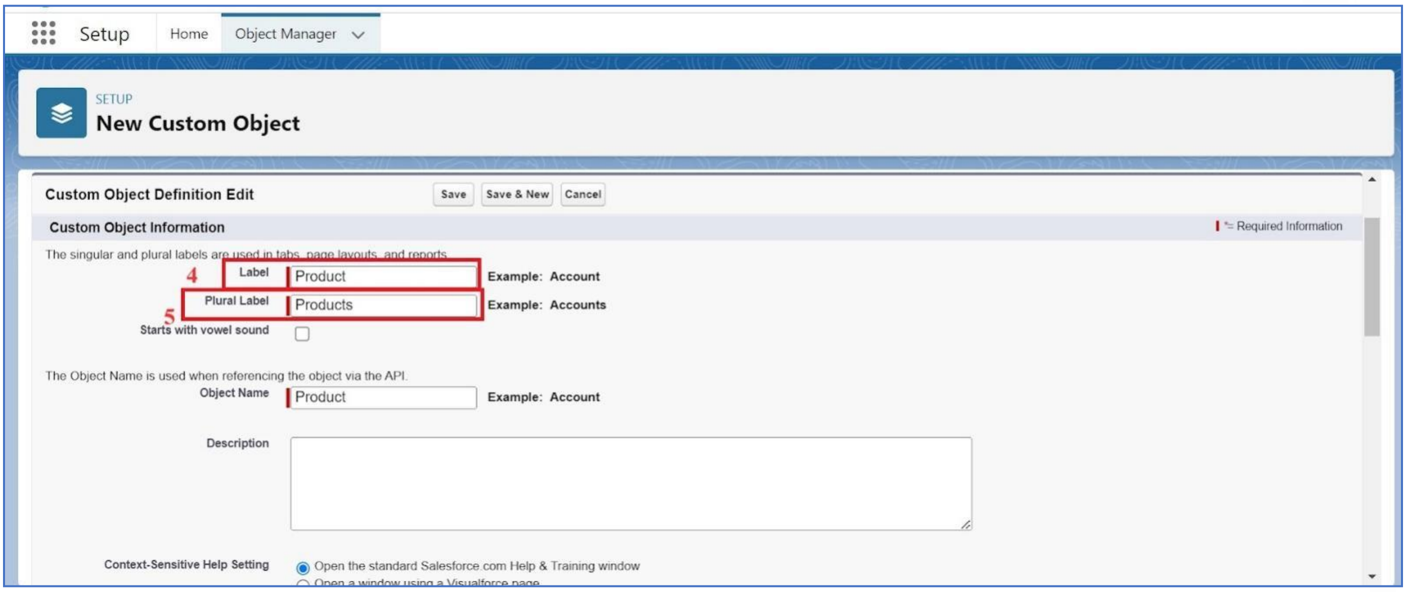
Activity 1: Creating a Product Object

From the setup page

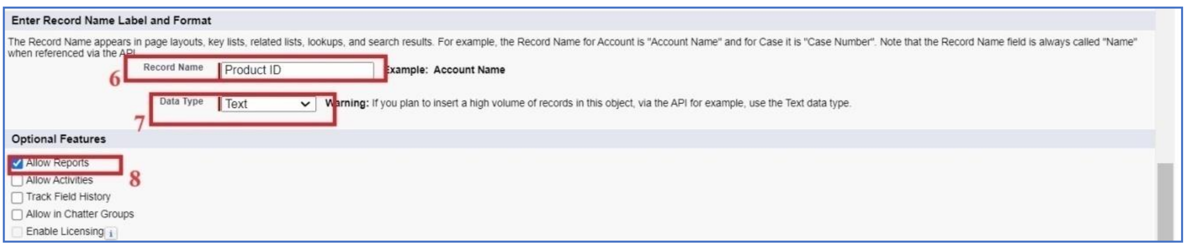
1. Click on Object Manager



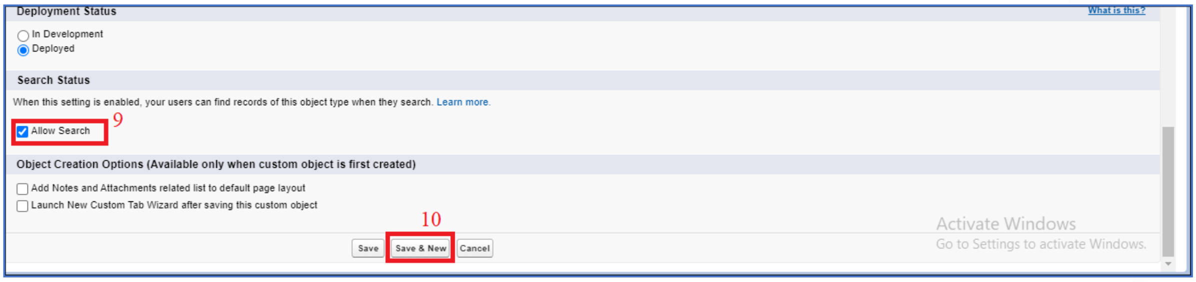
2. Click on Create >> Click on Custom Object.
3. Enter the label name as **Product**
4. Enter Plural label name as **Products**



5. Enter Record Name as **Product ID**
6. Select Data Type as **Text**
7. Select Allow reports.



8. Select Allow search.

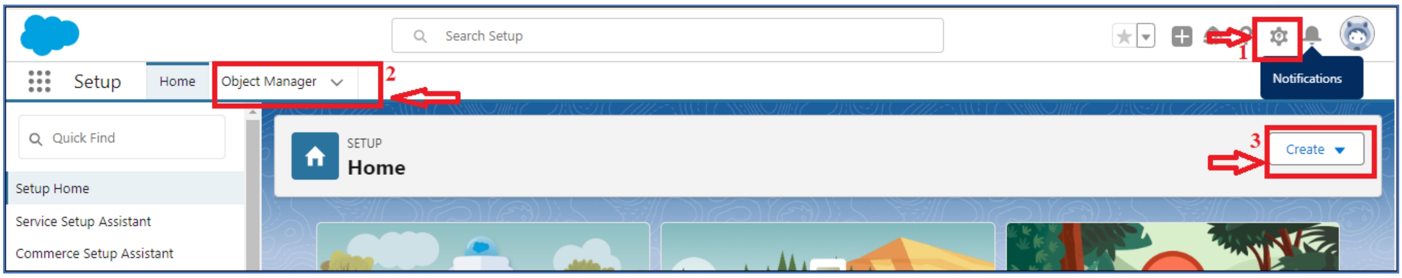


9. Click on Save and New

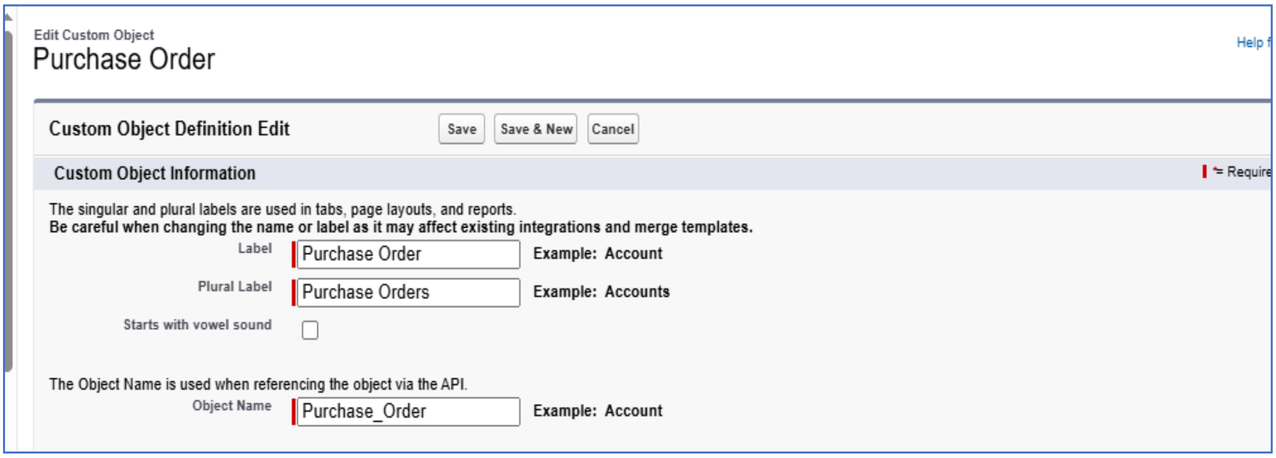
Activity 2: Creating a Purchase Order Object

From the setup page

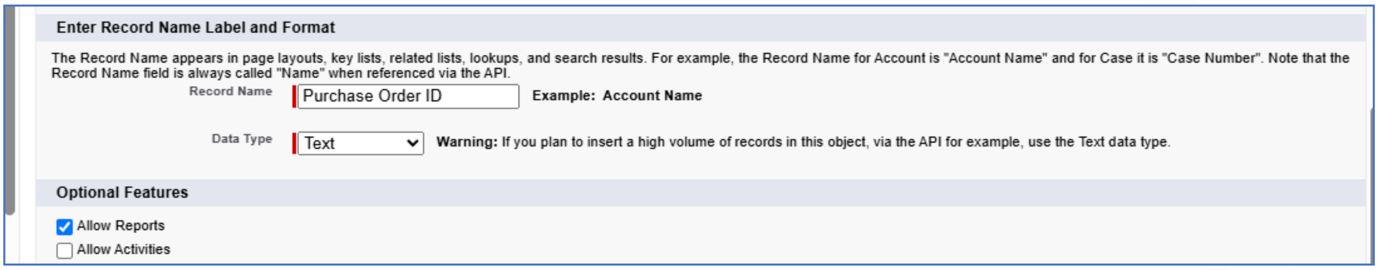
1. Click on Object Manager



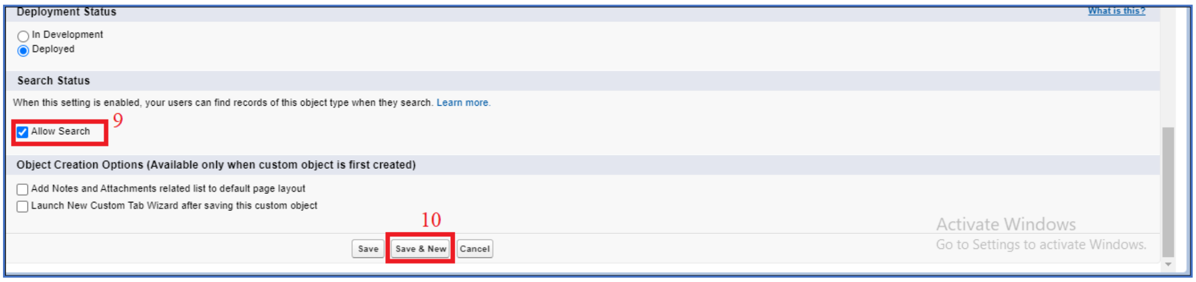
2. Click on Create >> Click on Custom Object.
3. Enter the label name as **Purchase Order**
4. Enter Plural label name as **Purchase Orders**



5. Enter Record Name as**Purchase Order ID**
6. Select Data Type as **Text**
7. Select Allow reports.



8. Select Allow search.

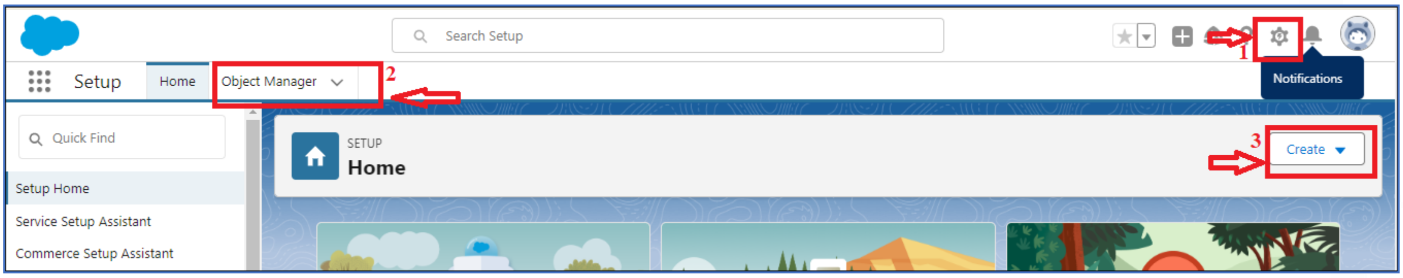


9. Click on Save and New

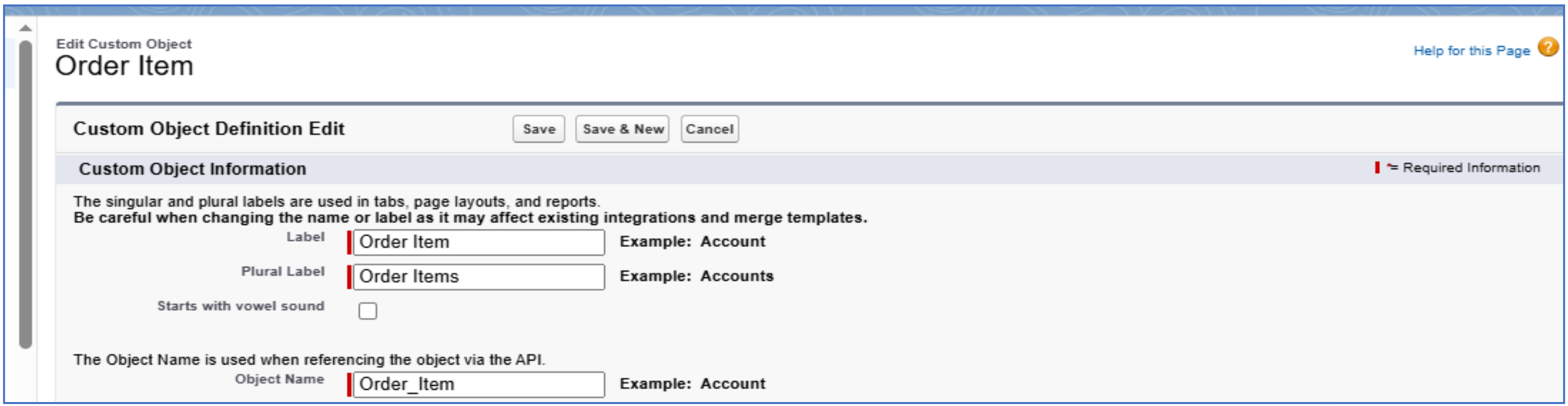
Activity 3: Creating a Order Item Object

From the setup page

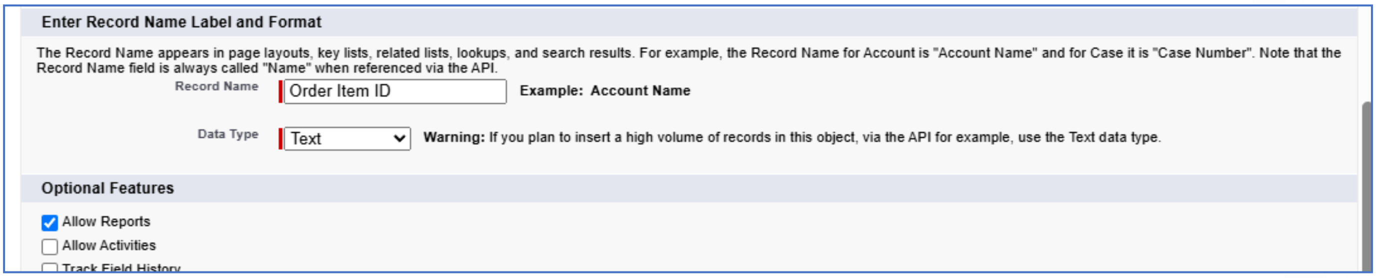
1. Click on Object Manager



2. Click on Create >> Click on Custom Object.
3. Enter the label name as **Order Item**
4. Enter Plural label name as **Order Items**



5. Enter Record Name as **Order Item ID**
6. Select Data Type as **Text**
7. Select Allow reports.



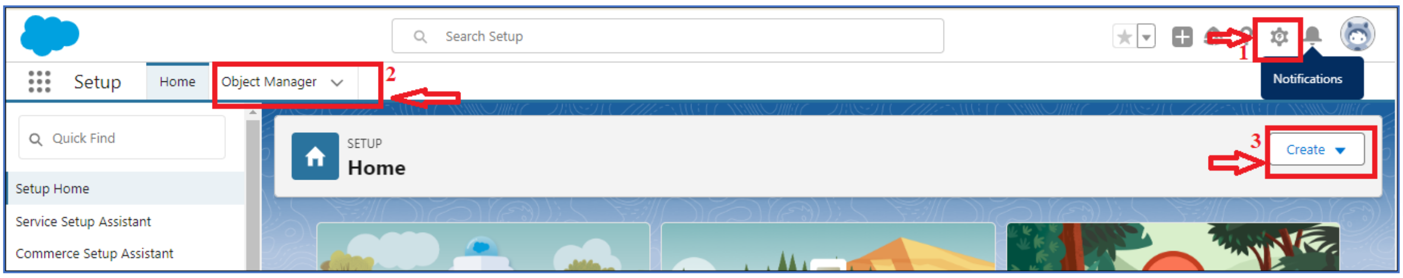
8. Select Allow search.

9. Click on Save and New

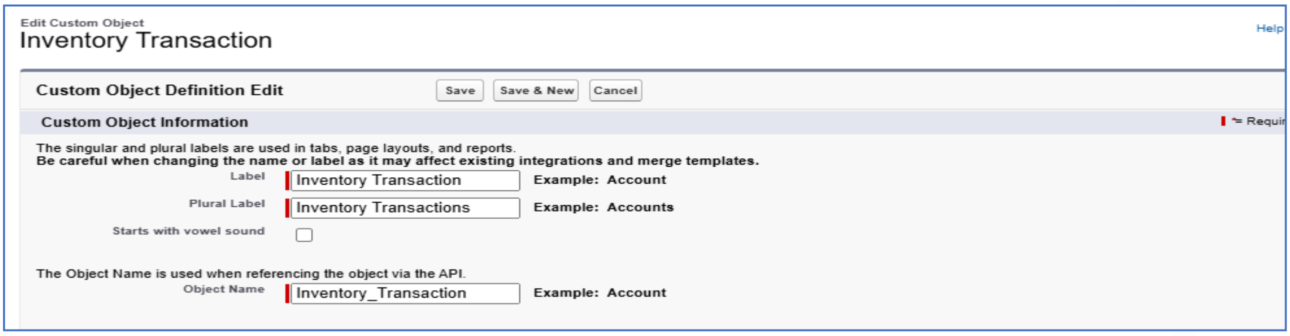
Activity 4: Creating a Inventory Transaction Object

From the setup page

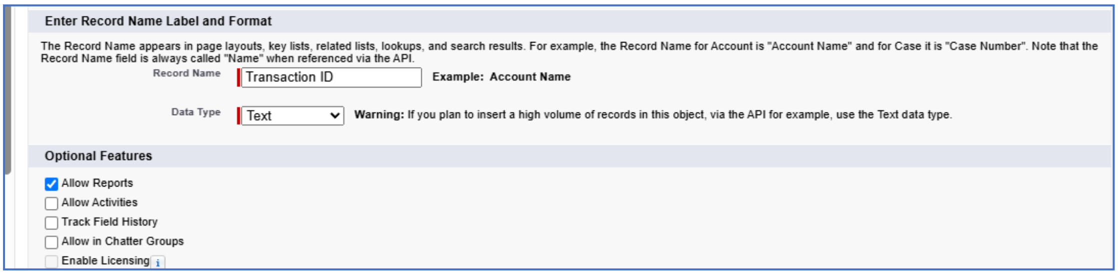
1. Click on Object Manager



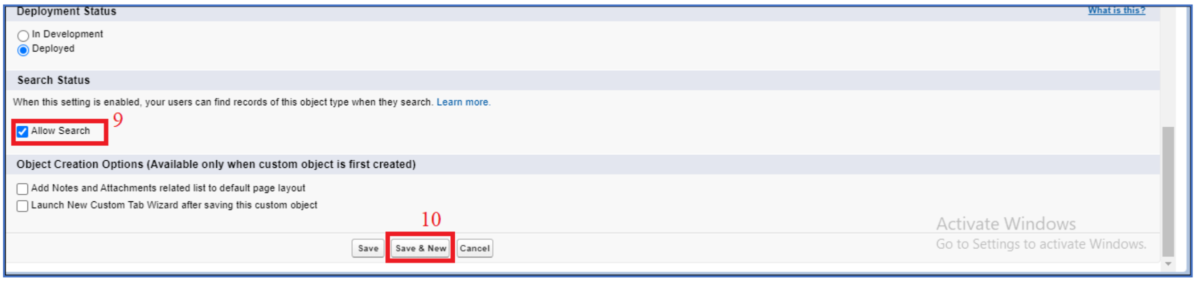
2. Click on Create >> Click on Custom Object.
3. Enter the label name as **Inventory Transaction**
4. Enter Plural label name as **Inventory Transactions**



5. Enter Record Name as **Transaction ID**
6. Select Data Type as **Text**
7. Select Allow reports.



8. Select Allow search.

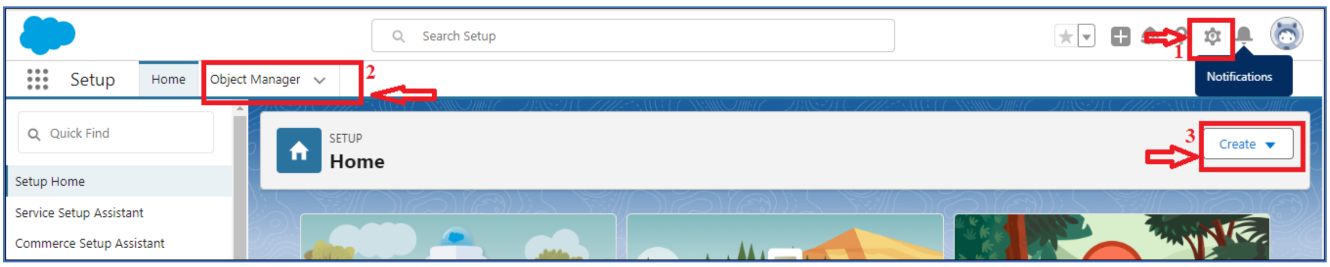


9. Click on Save and New

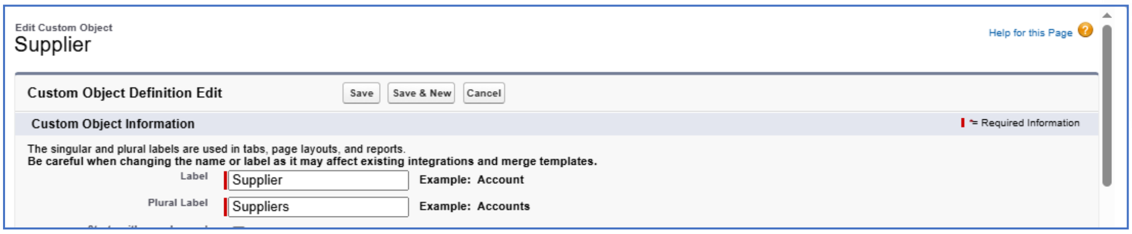
Activity 5: Creating a Supplier Object

From the setup page

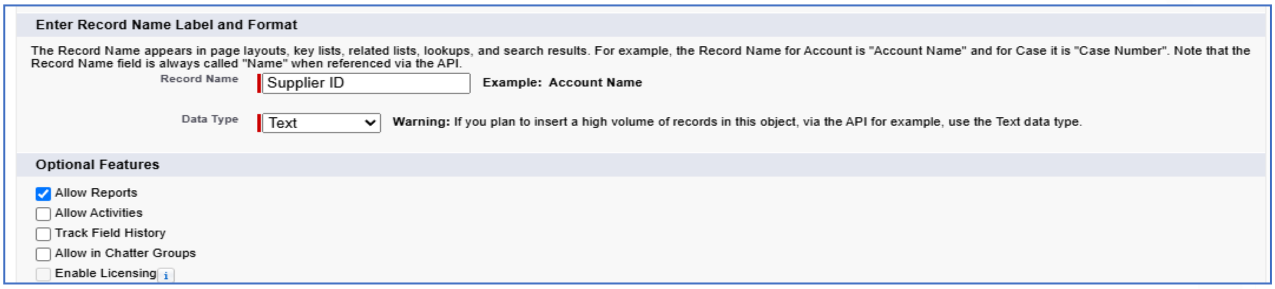
1. Click on Object Manager



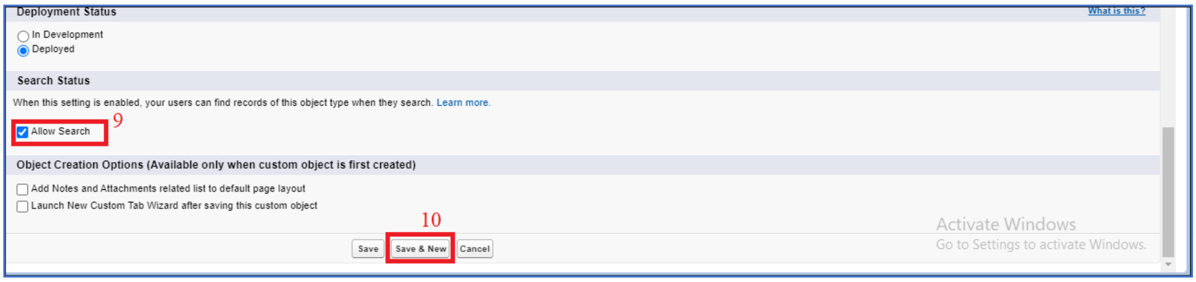
2. Click on Create >> Click on Custom Object.
3. Enter the label name as **Supplier**
4. Enter Plural label name as **Suppliers**



5. Enter Record Name as **Supplier ID**
6. Select Data Type as **Text**
7. Select Allow reports.



8. Select Allow search.



9. Click on Save and New

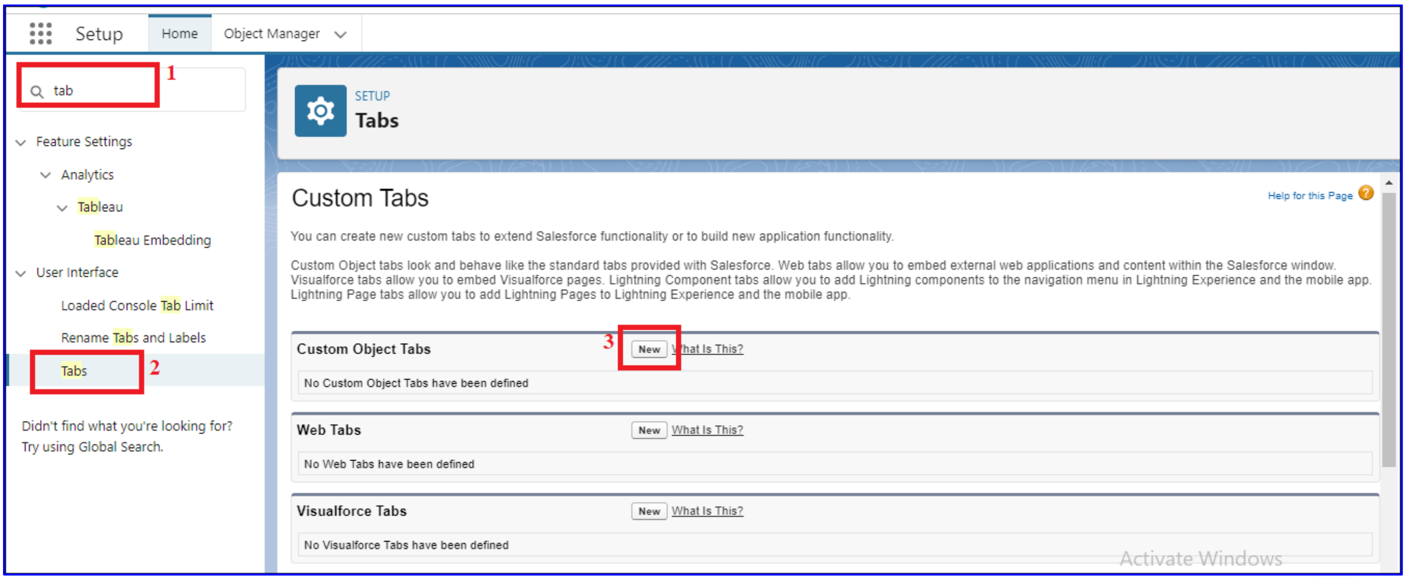
Output:

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Supplier	Supplier_c	Custom Object		6/1/2025	✓
Inventory Transaction	Inventory_Transaction_c	Custom Object		6/1/2025	✓
Order Item	Order_Item_c	Custom Object		6/1/2025	✓
Purchase Order	Purchase_Order_c	Custom Object		6/1/2025	✓
Product	Product_c	Custom Object		5/30/2025	✓

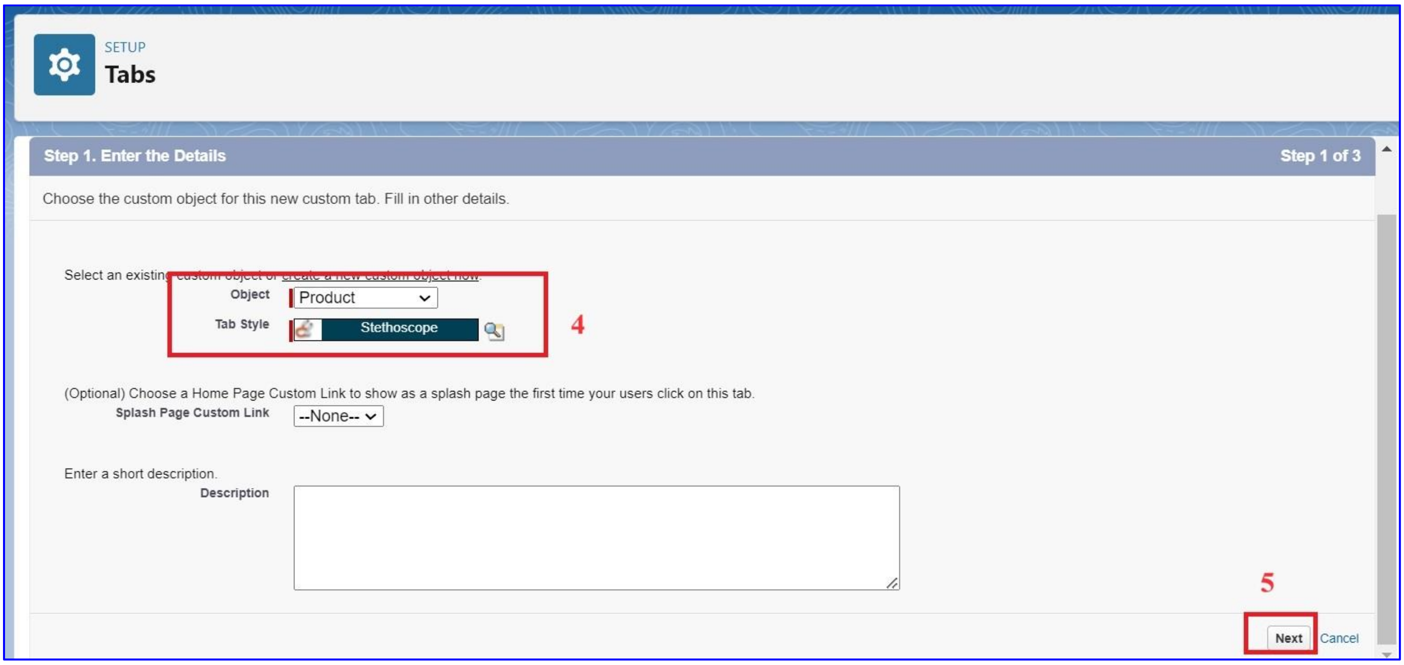
MEDICAL INVENTORY MANAGEMENT
Milestone -3
Tabs Creation

Activity 1: Creating a tab for Product Object

1. Go to the setup page >> type Tabs in Quick Find bar
2. Click on tabs
3. Click on New (under custom object tab).



4. Select Object(Product) >> Select the tab style



5. Click on Next >> (Add to profiles page) keep it as default >> Click on Next (Add to Custom App) uncheck the include tab .

6. Make sure that the Append tab to user's existing personal customizations is checked.

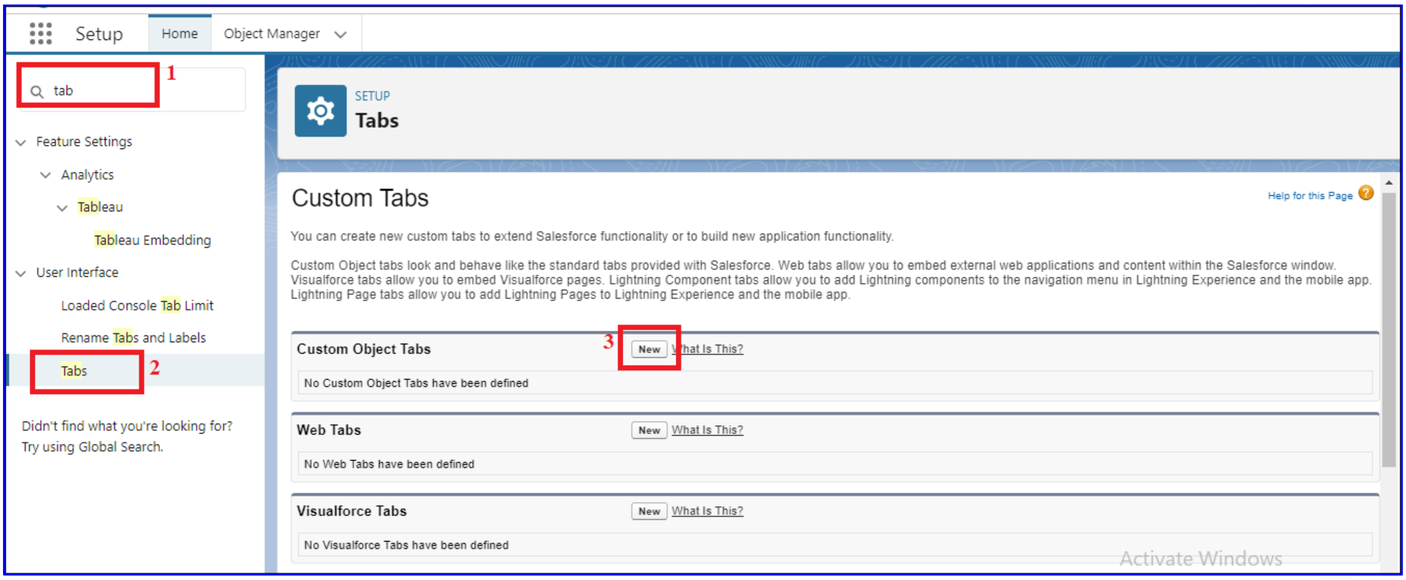
7. Click save.

Activity 2: Creating a tab for Purchase Order Object

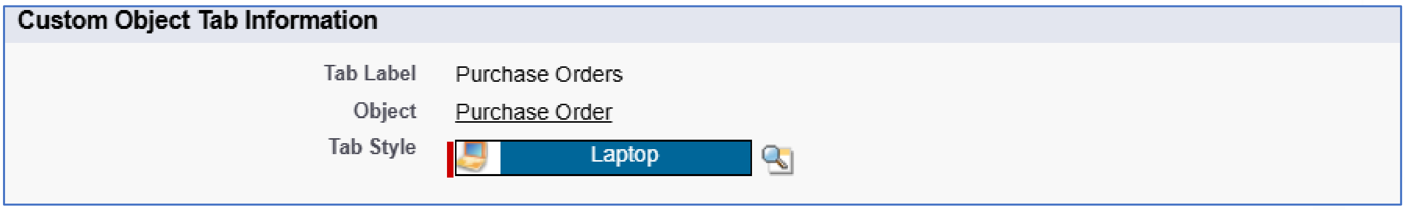
1. Go to the setup page >> type Tabs in Quick Find bar

2. Click on tabs

3. Click on New (under custom object tab).



4. Select Object(Purchase Order) >> Select the tab style



5. Click on Next >> (Add to profiles page) keep it as default >> Click on Next (Add to Custom App) uncheck the include tab .

6. Make sure that the Append tab to user's existing personal customizations is checked.

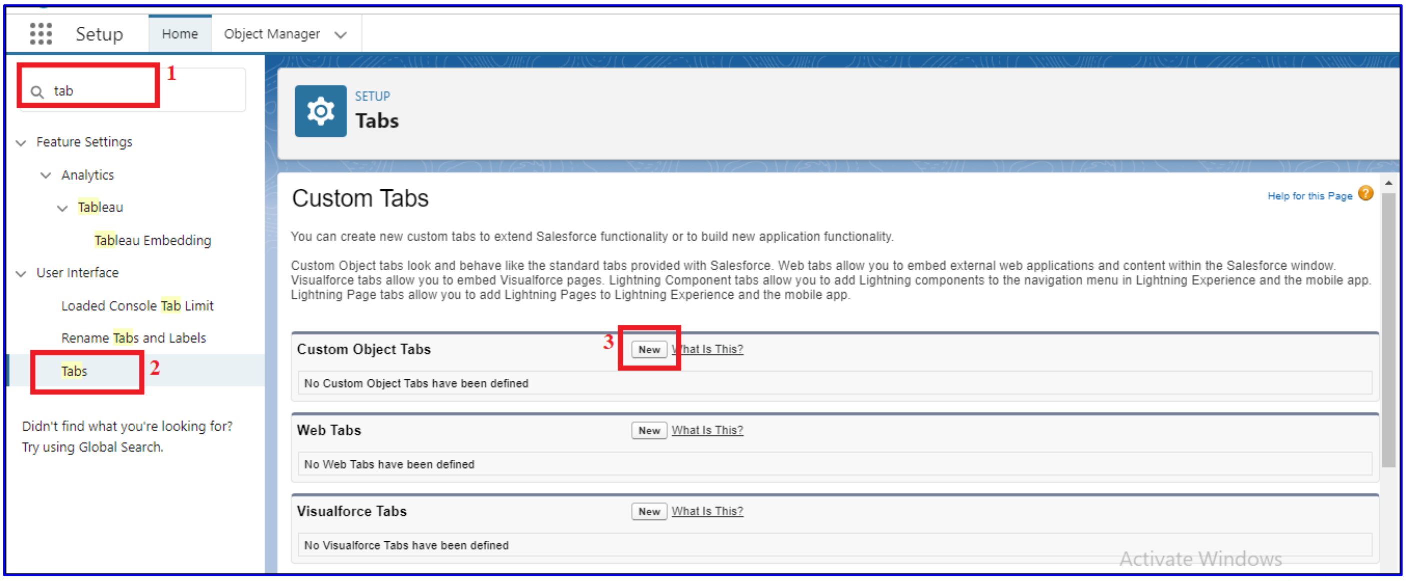
7. Click save.

Activity 3: Creating a tab for Order Item Object

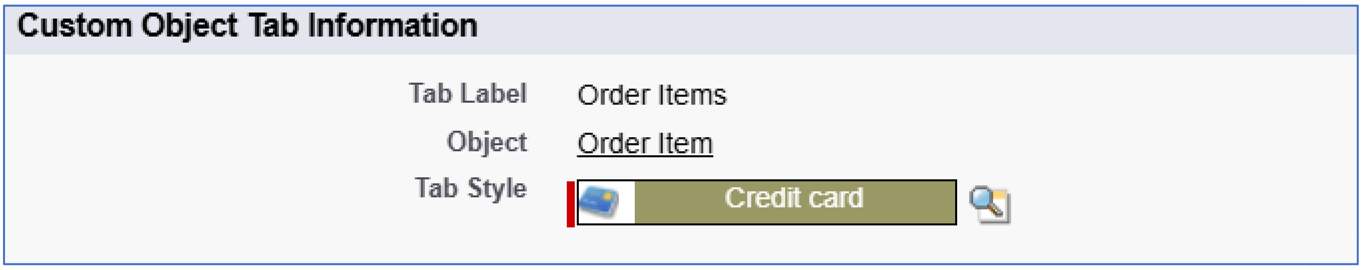
1. Go to the setup page >> type Tabs in Quick Find bar

2. Click on tabs

3. Click on New (under custom object tab).



4. Select Object(Order Item) >> Select the tab style



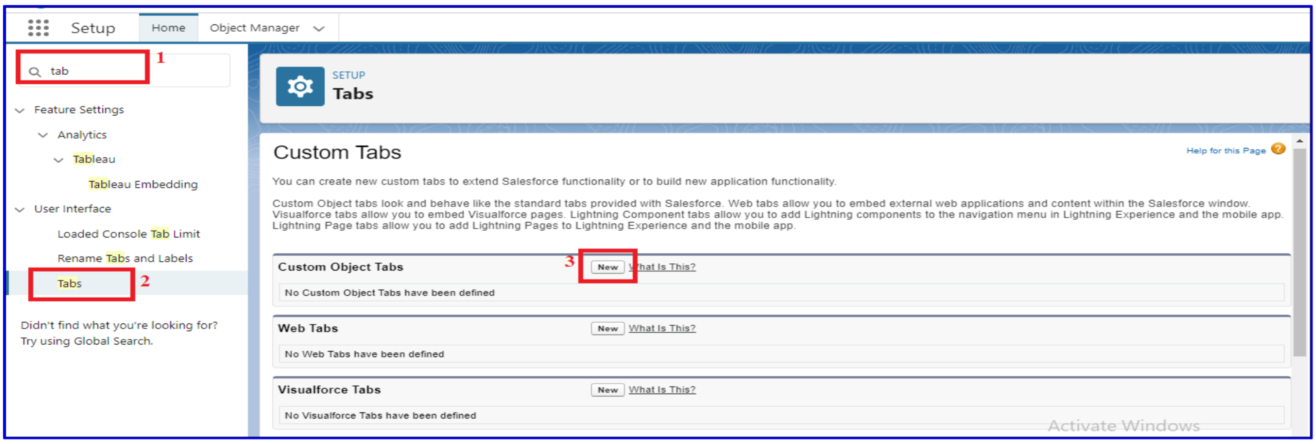
5.Click on Next >> (Add to profiles page) keep it as default >> Click on Next (Add to Custom App) uncheck the include tab .

6.Make sure that the Append tab to user's existing personal customizations is checked.

7.Click save.

Activity 4: Creating a tab for Inventory Transaction Object

1. Go to the setup page >> type Tabs in Quick Find bar
2. Click on tabs
3. Click on New (under custom object tab).



4. Select Object(Inventory Transaction) >> Select the tab style

5.Click on Next >> (Add to profiles page) keep it as default >> Click on Next (Add to Custom App) uncheck the include tab .

6.Make sure that the Append tab to user's existing personal customizations is checked.

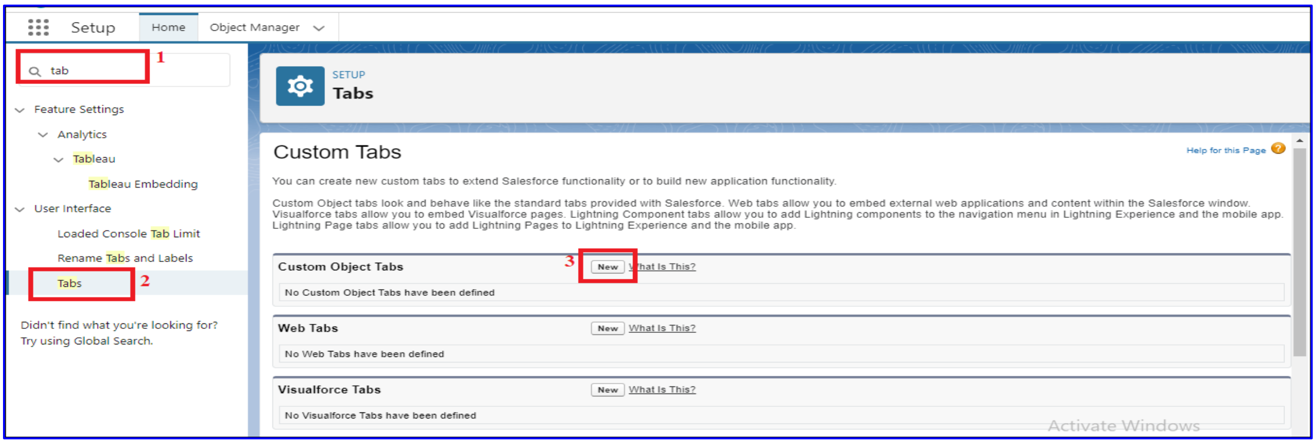
7.Click save.

Activity 5: Creating a tab for Supplier Object

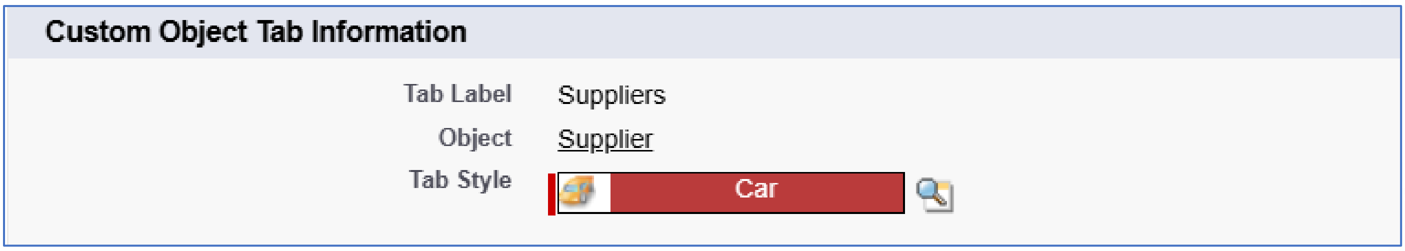
1. Go to the setup page >> type Tabs in Quick Find bar

2. Click on tabs

3. Click on New (under custom object tab).



4. Select Object(Supplier) >> Select the tab style



5.Click on Next >> (Add to profiles page) keep it as default >> Click on Next (Add to Custom App) uncheck the include tab .

6.Make sure that the Append tab to user's existing personal customizations is checked.

7.Click save.

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 conte
Visualforce pages. Lightning Component tabs allow you to add Lightning components to the navigation menu in Lightning Experience and the mobile ap
Experience and the mobile app.

Custom Object Tabs New What Is This?

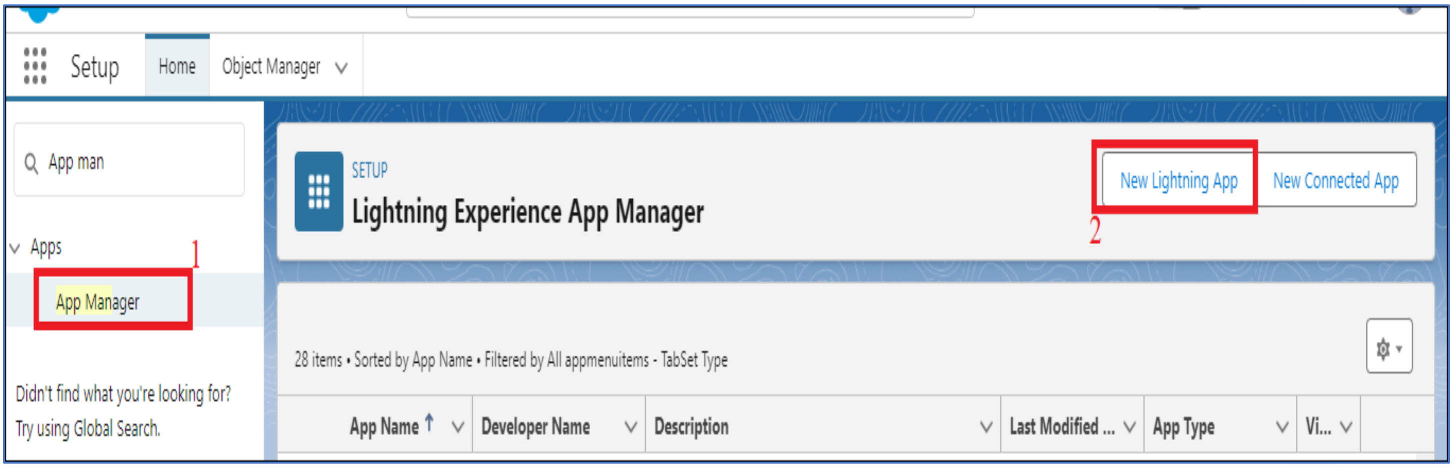
Action	Label	Tab Style
Edit | Del	Inventory Transactions	Gears
Edit | Del	Order Items	Credit card
Edit | Del	Products	Computer
Edit | Del	Purchase Orders	Laptop
Edit | Del	Suppliers	Car

MEDICAL INVENTORY MANAGEMENT
Milestone-4

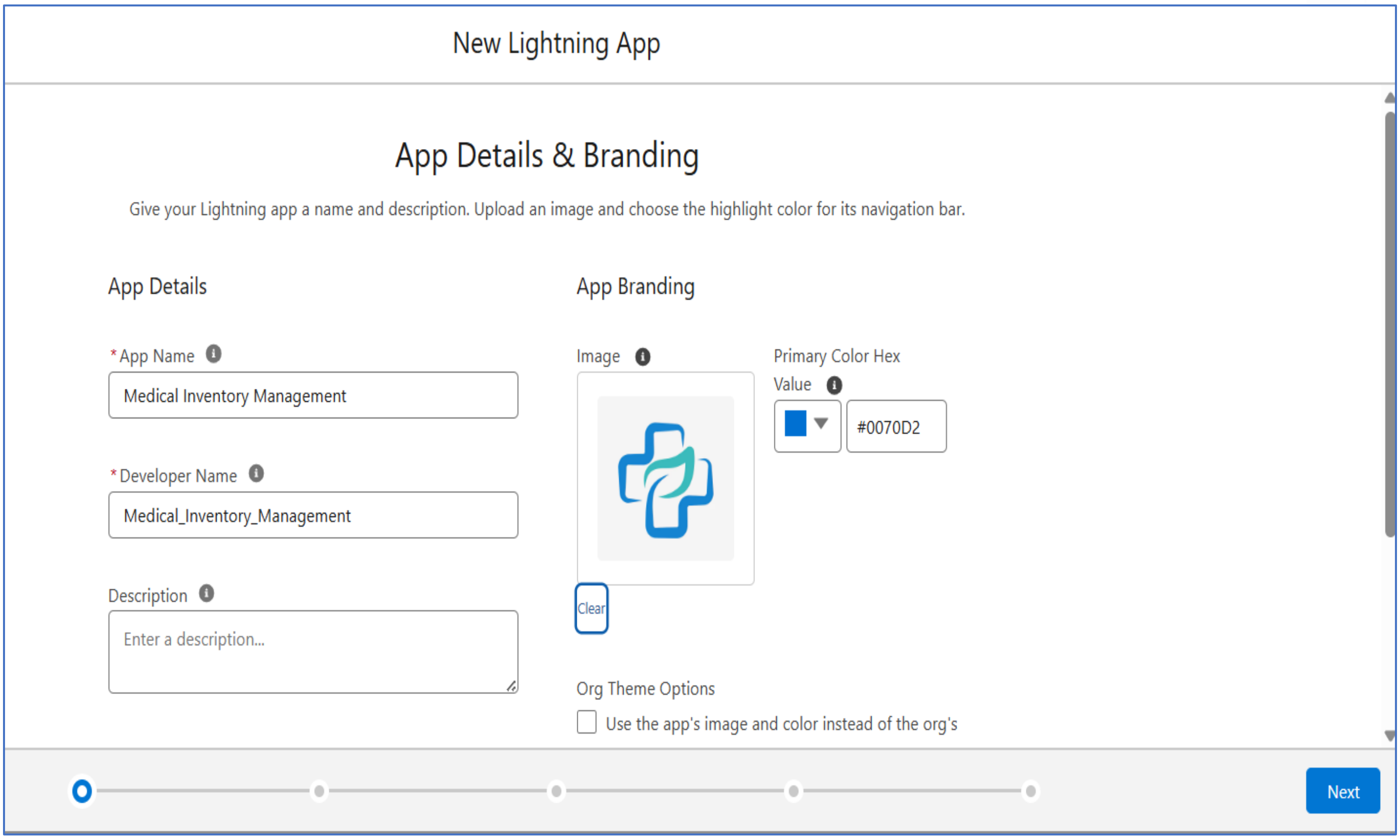
The Lightning app creation

Activity 1: Create a Lightning App for Medical Inventory Management

1. From Setup, enter App Manager in the Quick Find and select App Manager.
2. Click New Lightning App.

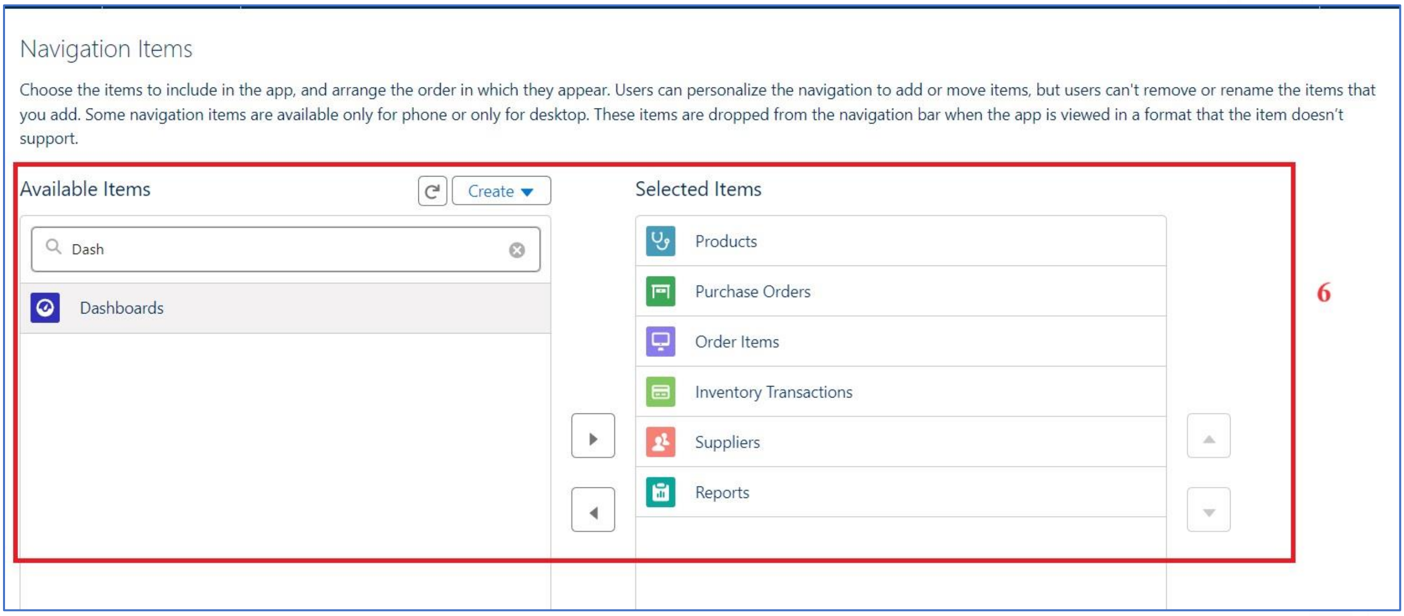


3. Enter Medical Inventory Management as the App Name >> Click on upload image and add an image related to Medical Inventory then click next

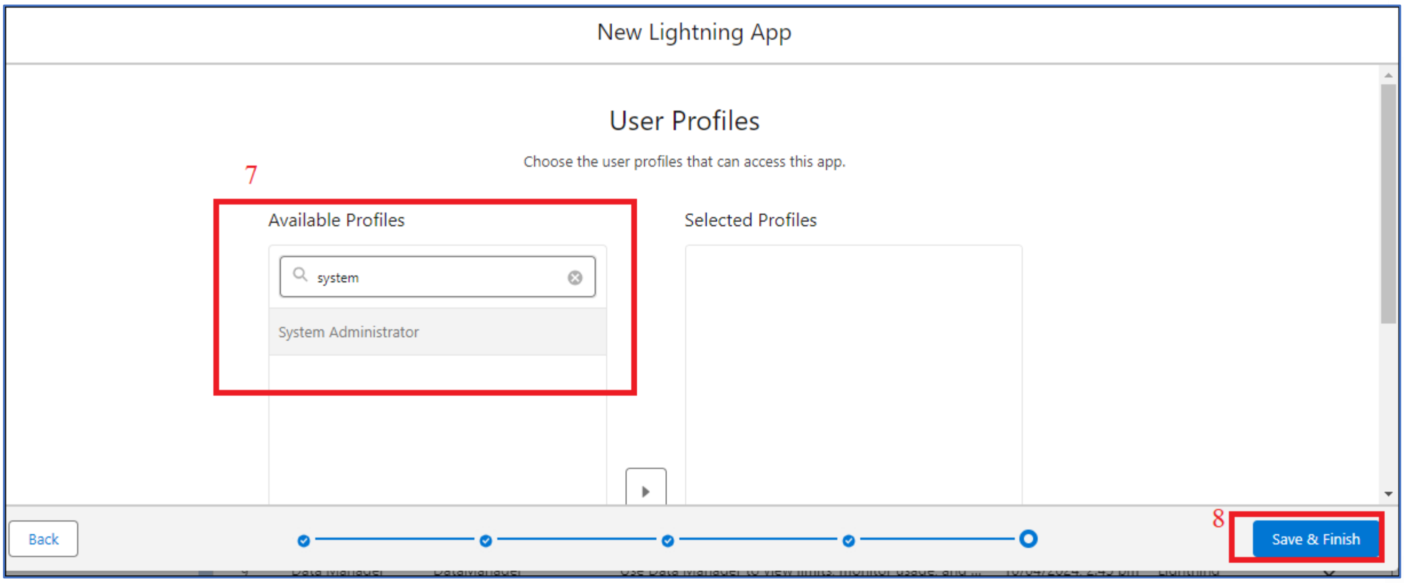


4. Under App Options, leave the default selections and click next.
5. Under Utility Items, leave as is and click Next.

6. From Available Items, select Products, Purchase Orders, Order Items, Inventory Transactions, Suppliers, Reports, and Dashboards and move them to Selected Item and Click Next.



7. From Available Profiles, select System Administrator and move it to Selected Profiles.



8. Click Save & Finish.

MEDICAL INVENTORY MANAGEMENT
Milestone-5

Fields creation

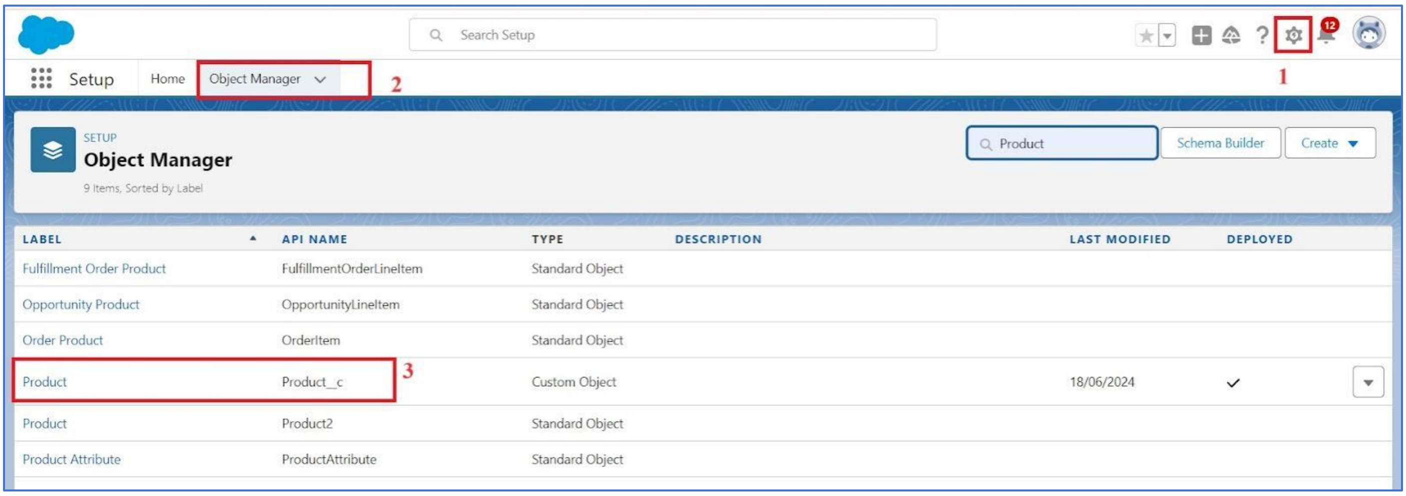
Creating Fields in Product Object:

Object	Field Name	Data Type
Product	Product ID(Standard)	Text
	Product Name	Text
	Product Description	Text Area
	Minimum Stock Level	Number(18, 0)
	Current Stock Level	Number(18, 0)
	Unit Price	Currency(16, 2)
	Expiry Date	Date

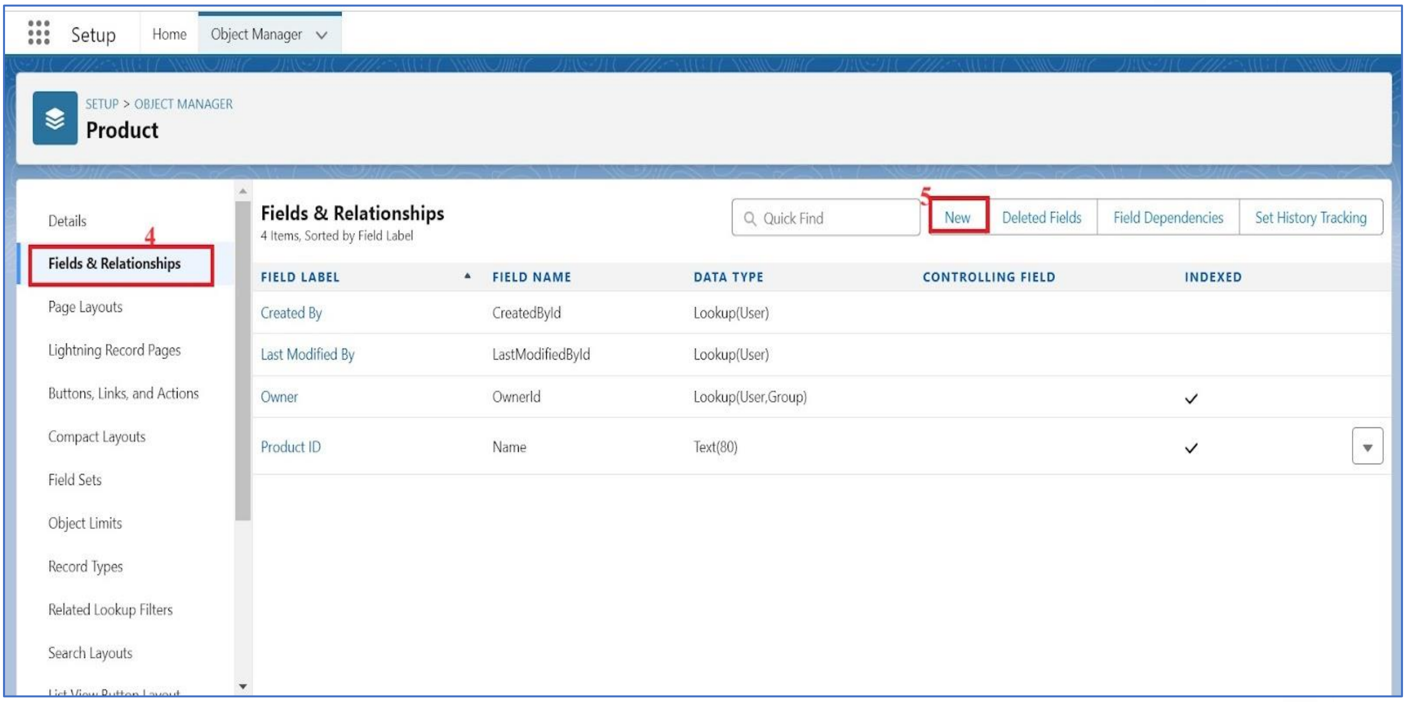
Activity 1: Creating a Text Field in Product Object

To create fields in an object:

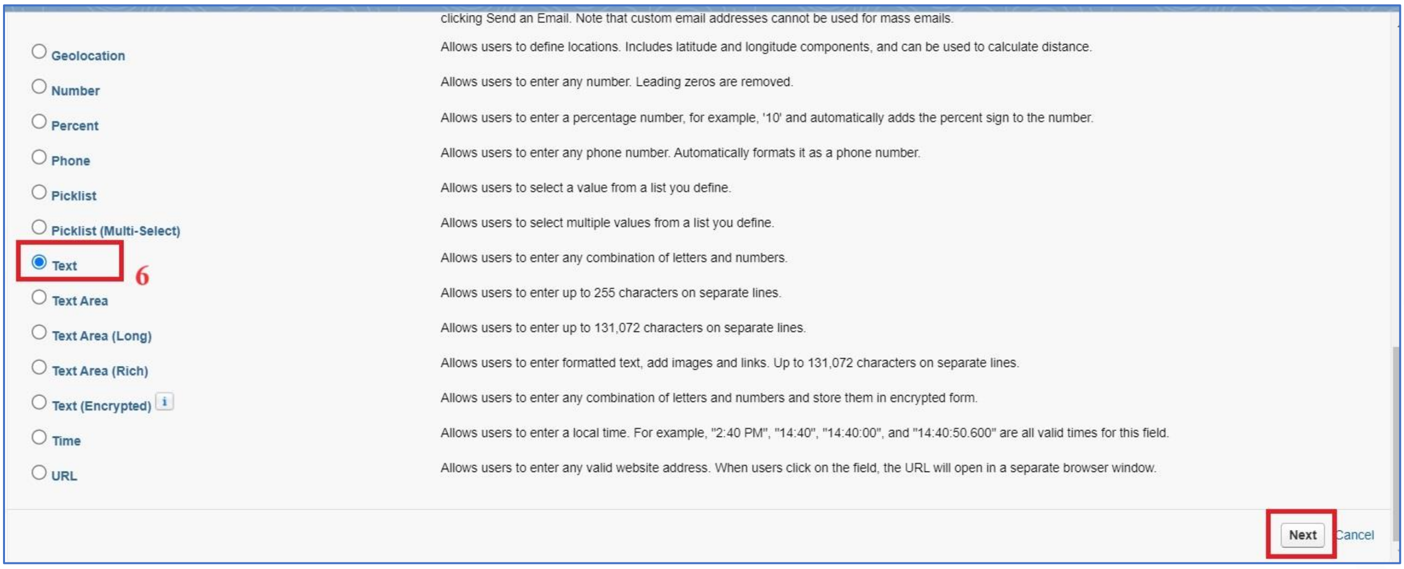
1. Click the gear icon and select Setup. This launches Setup in a new tab.
2. Click the Object Manager tab next to Home.
3. Select Product custom object.



4. Select Fields & Relationships from the left navigation
5. Click on New

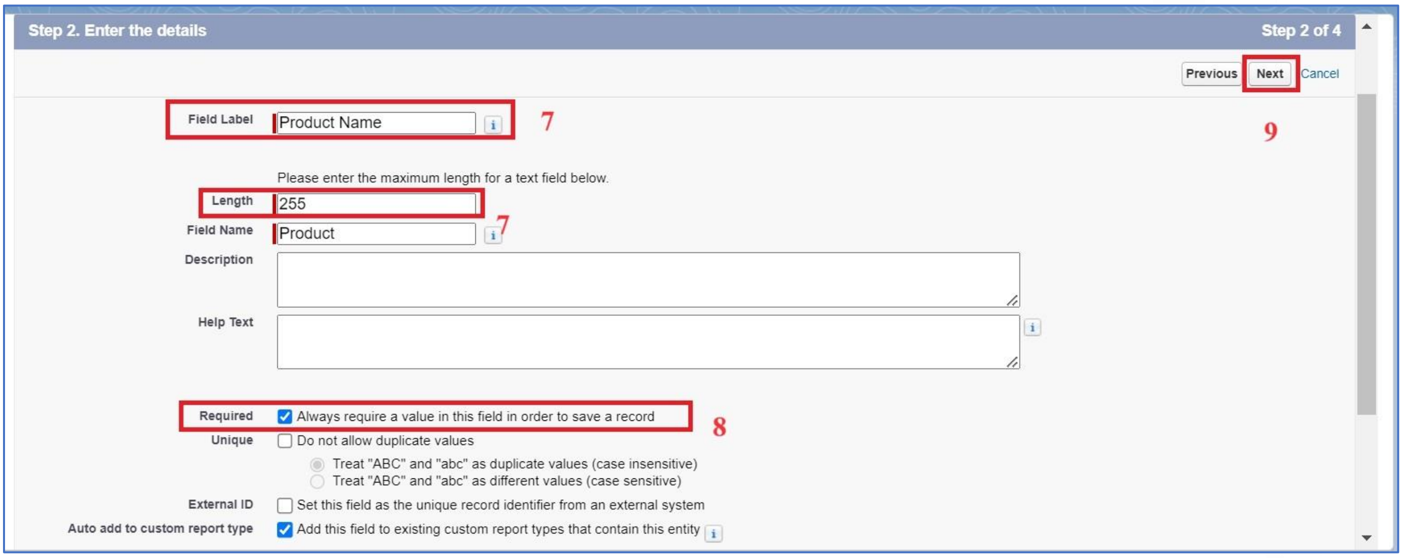


6. Select Text field, click Next



7. Enter Field Label as “Product Name” and Length 255.

8. Select Required Field.

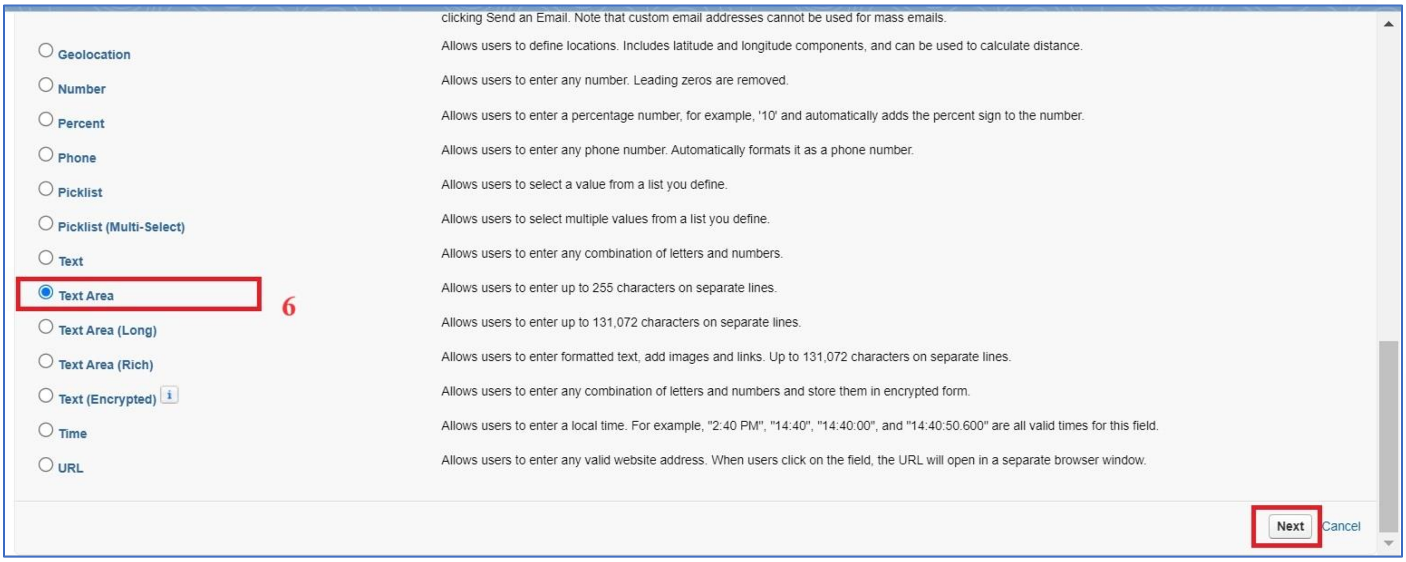


9. Click Next, Next, then Save & New.

Activity 2: Creating a Text Area Field in Product Object

To create fields in an object:

1. Click the gear icon and select Setup. This launches Setup in a new tab.
2. Click the Object Manager tab next to Home.
3. Select Product custom object.
4. Select Fields & Relationships from the left navigation
5. Click on New
6. Select TextArea field, click Next



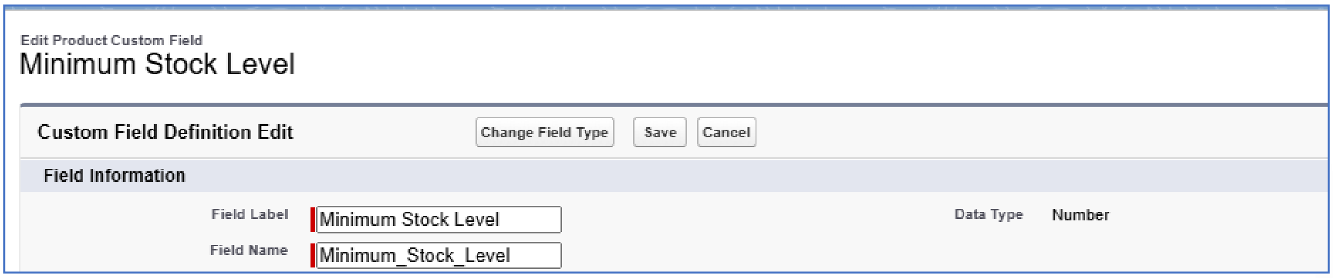
7. Enter Field Label as “Product Description” .

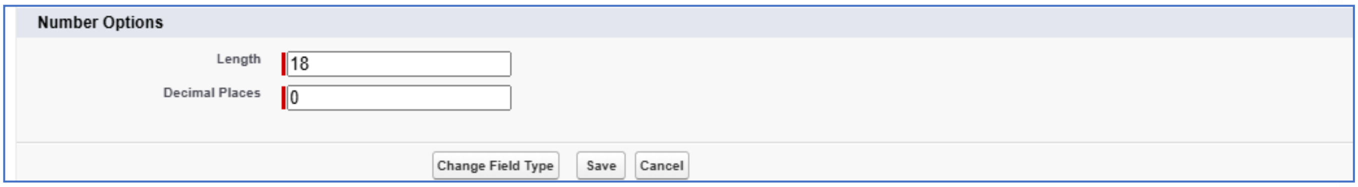
8. Click Next, Next, then Save & New.

Activity 3: Creating a Number Field in Product object

To create fields in an object:

1. Go to setup >> click on Object Manager >> type object name(Product) in quick find box >> click on the Product custom object.
2. Now click on "Fields & Relationships"
3. Click on New.
4. Select Data type as "Number" and click Next.
5. Enter Field Label as " Minimum Stock Level".
6. Length - 18, Decimal Places - 0.



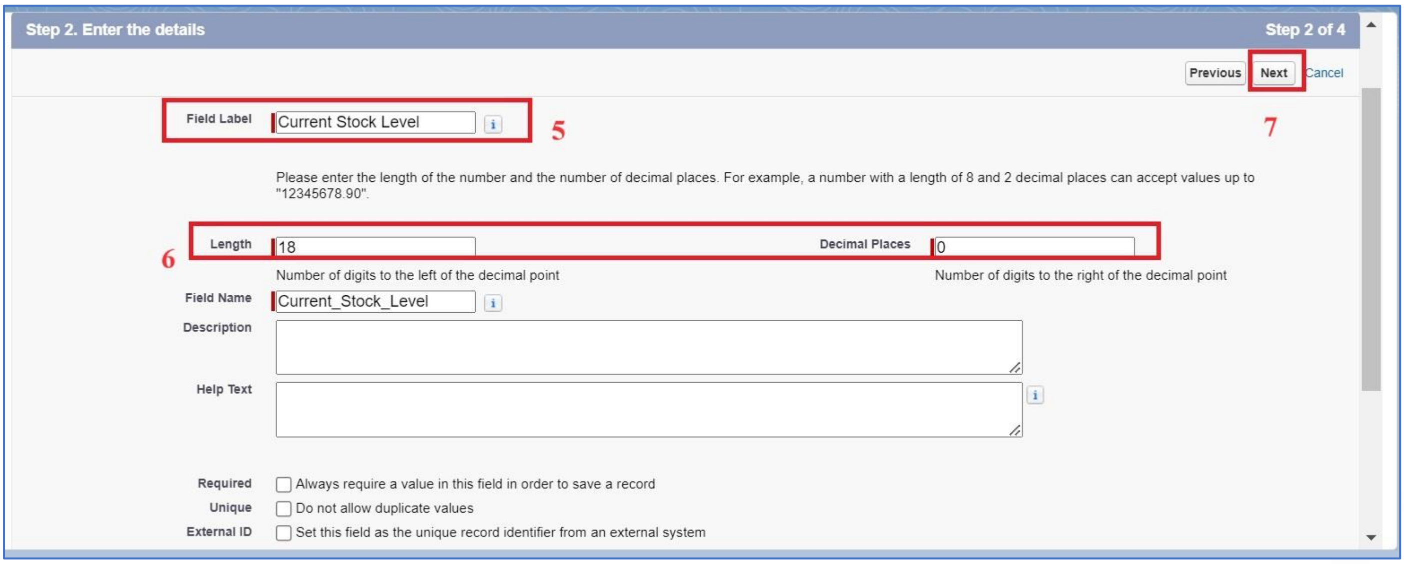


7. Click on Next, Next and Save.

Activity 4: Creating a Number Field in Product object

To create fields in an object:

1. Go to setup >> click on Object Manager >> type object name(Product) in quick find box >> click on the Product custom object.
2. Now click on "Fields & Relationships"
3. Click on New.
4. Select Data type as "Number" and click Next.
5. Enter Field Label as " Current Stock Level".
6. Length - 18, Decimal Places - 0.

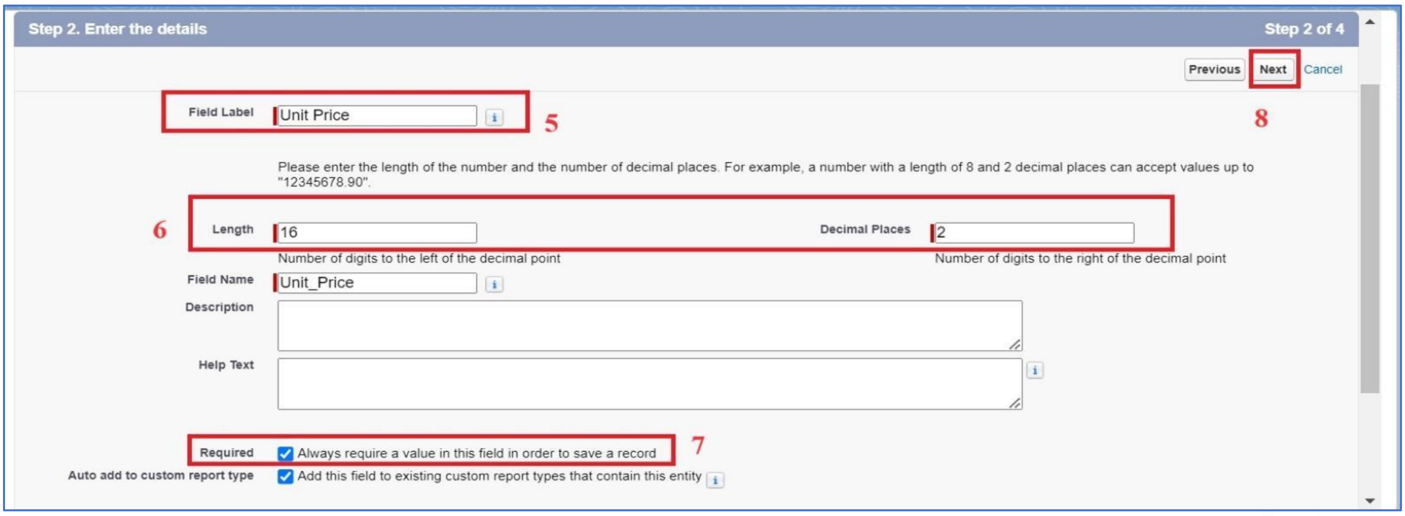


7. Click on Next, Next and Save.

Activity 5: Creating a Currency Field in Product object

To create fields in an object:

1. Go to setup >> click on Object Manager >> type object name(Product) in quick find box >> click on the Product custom object.
2. Now click on "Fields & Relationships"
3. Click on New.
4. Select Data type as "Currency" and click Next.
5. Enter Field Label as " Unit Price".
6. Length - 16, Decimal Places - 2.
7. Select Required Field.

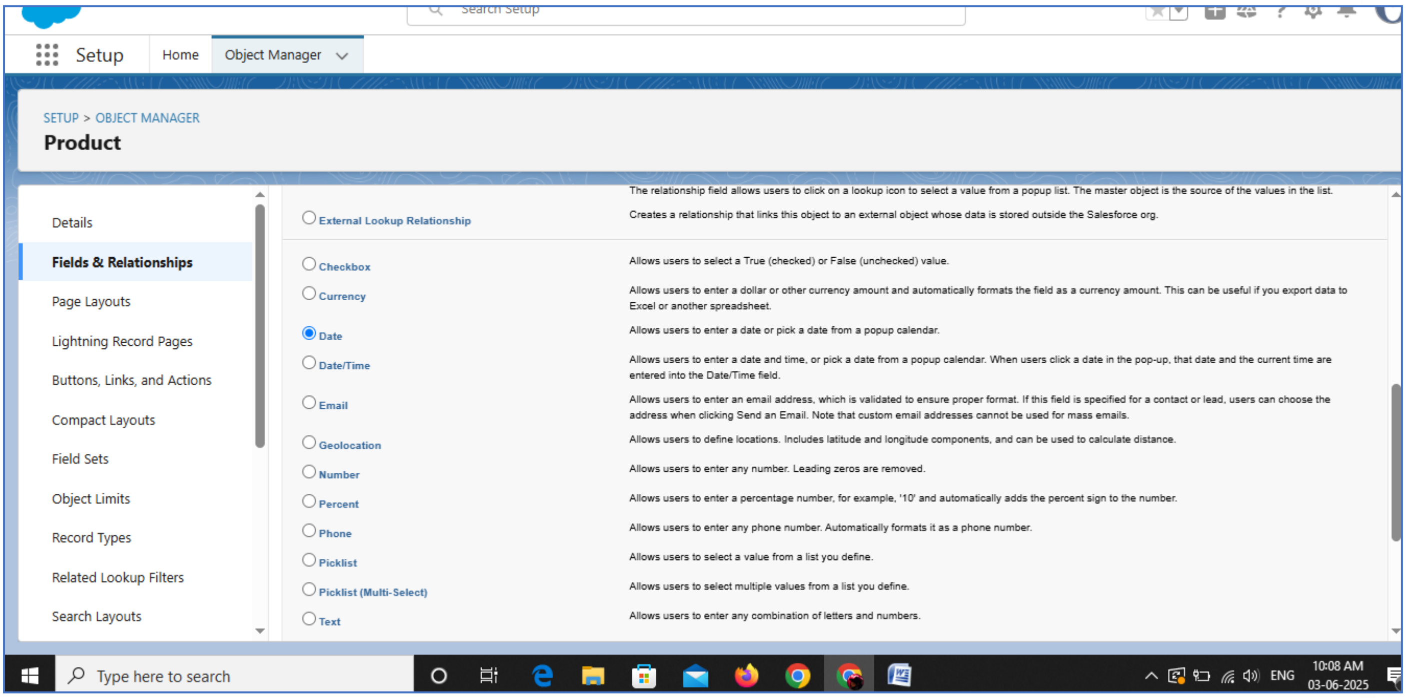


8. Click on Next, Next and Save.

Activity 6: Creating Date field in Product Object

To create fields in an object:

1. Go to setup >> click on Object Manager >> type object name(Product) in quick find box >> click on the Product custom object.
2. Now click on “Fields & Relationships”
3. Click on New.
4. Select Data type as “Date” and click Next.



5. Enter Field Label as “Expiry Date”.

6. Click on Next, Next and Save.

Creating Fields in Purchase Order Object:

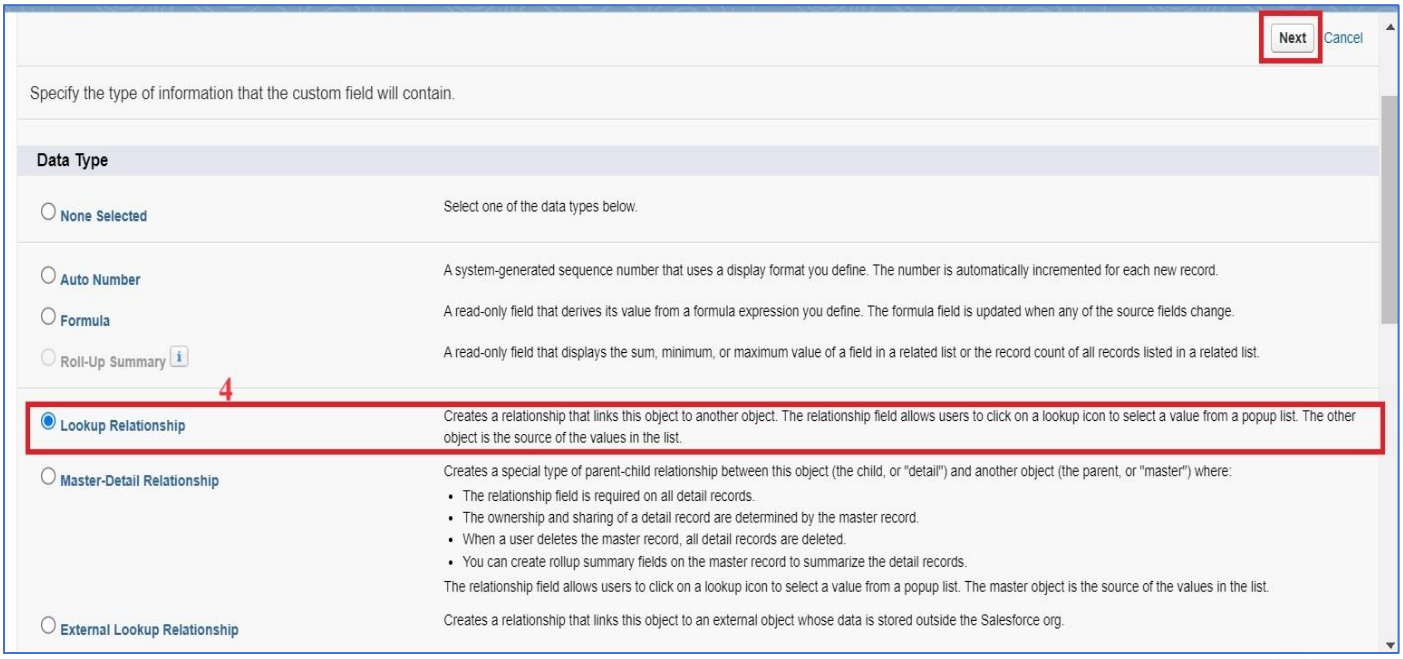
Purchase Order	Purchase Order ID(Standard)	Text
	Supplier ID	Lookup(Supplier)
	Order Date	Date
	Expected Delivery Date	Date
	Actual Delivery Date	Date
	Order Count	Roll-Up Summary (COUNT Order Item)
	Total Order Cost	Currency(16, 2)

Activity 1 : Creating Lookup Relationship in Purchase Order Object

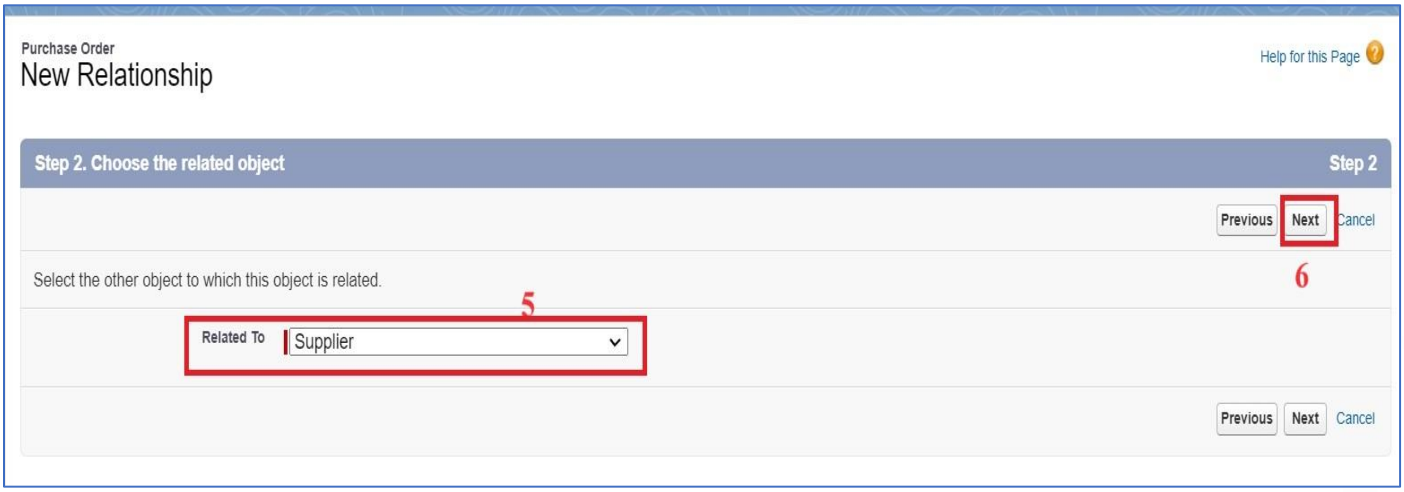
A Lookup relationship is a type of relationship in Salesforce that connects two objects together based on a field known as the Lookup field. It establishes a relationship between a child object and a parent object, allowing the child object to reference the parent object.

To Create a relationship from Purchase Order to Supplier .

1. Go to the Setup page >> click on Object manager >> type object name(Purchase Order) in the quick find bar >> click on the Purchase Order object.
2. Click on Fields & Relationship
3. Click on New.
4. Select “Lookup relationship” as data type and click Next.



5. Select the related object " Supplier".



6. Click on Next.
7. Give Field Label as "Supplier ID" .
8. Select Required Field.

9. Click on Next , Next, Next , Save.

Activity 2: Creating a Date Field in Purchase Order object

To create fields in an object:

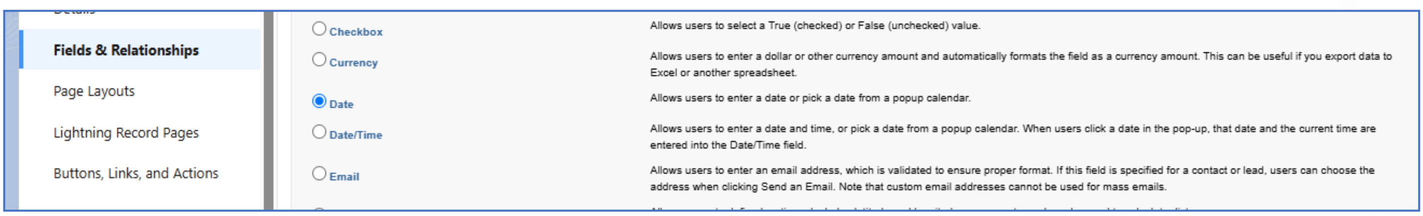
1. Go to setup >> click on Object Manager >> type object name(Purchase Order) in quick find box>> click on the Purchase Order object.
2. Now click on “Fields & Relationships”
3. Click on New.
4. Select Data type as “Date” and click Next.
5. Enter Field Label as “ Order Date”.

6. Click on Next, Next and Save.

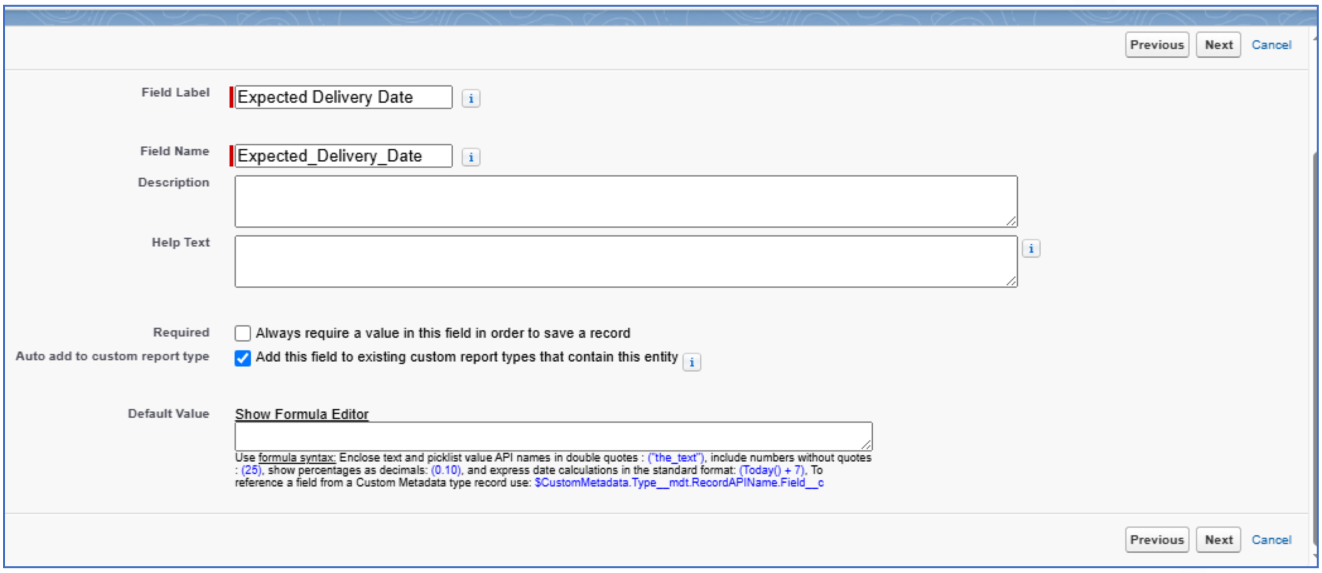
Activity 3: Creating a Date Field in Purchase Order object

To create fields in an object:

1. Go to setup >> click on Object Manager >> type object name(Purchase Order) in quick find box>> click on the Purchase Order object.
2. Now click on “Fields & Relationships”
3. Click on New.
4. Select Data type as “Date” and click Next.



5. Enter field label as "Expected Delivery Date".



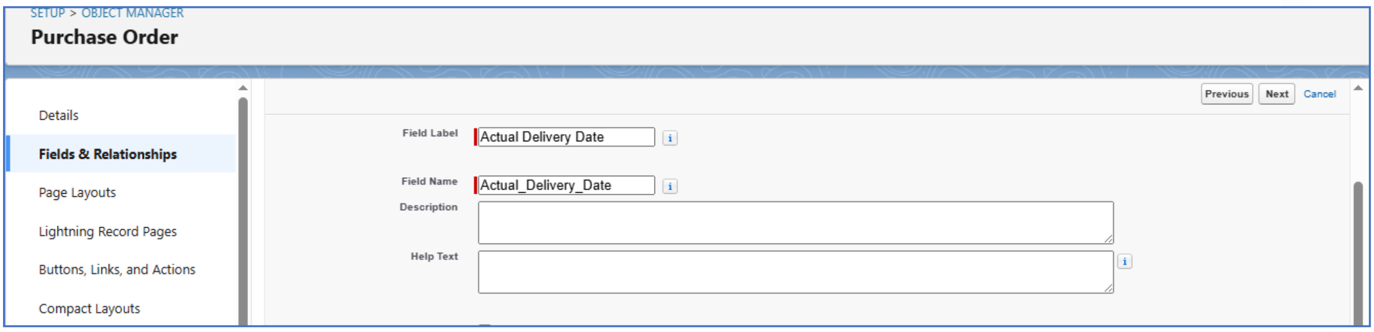
6. Click on Next, Next and Save.

Activity 4: Creating a Date Field in Purchase Order object

To create fields in an object:

1. Go to setup >> click on Object Manager >> type object name(Purchase Order) in quick find box>> click on the Purchase Order object.
2. Now click on "Fields & Relationships"
3. Click on New.
4. Select Data type as "Date" and click Next.

5. Enter field label as "Actual Delivery Date".

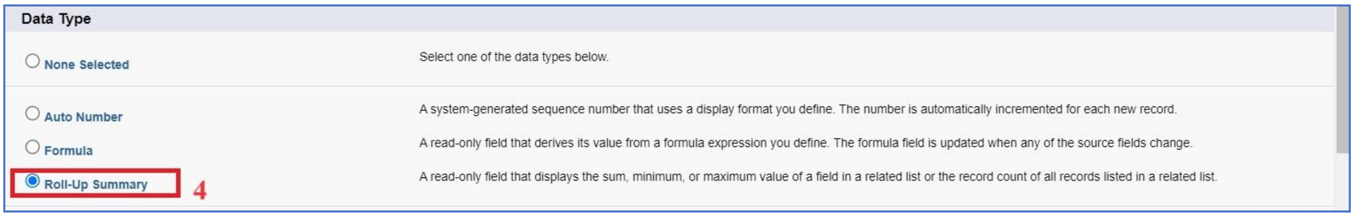


6. Click on Next, Next and Save.

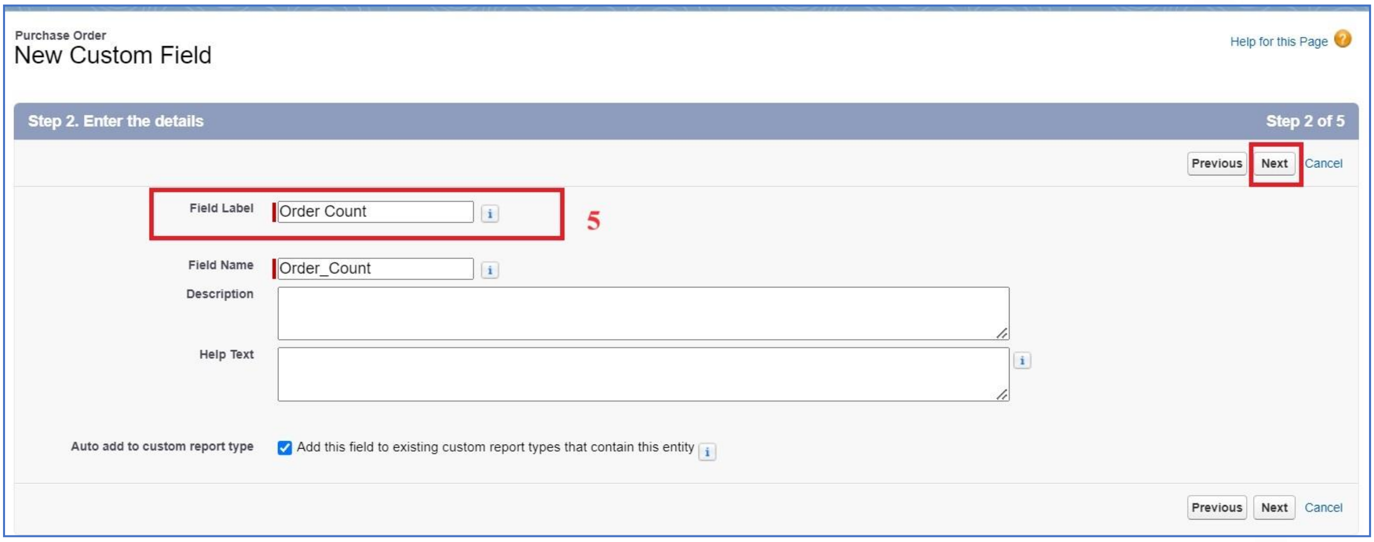
Activity 5: Creating a Roll-Up Summary Field in Purchase Order object

To create fields in an object:

1. Go to setup >> click on Object Manager >> type object name(Purchase Order) in quick find box>> click on the Purchase Order object.
2. Now click on "Fields & Relationships"
3. Click on New.
4. Select Data type as "Roll-Up Summary" and click Next.



5. Enter Field Label as " Order Count".



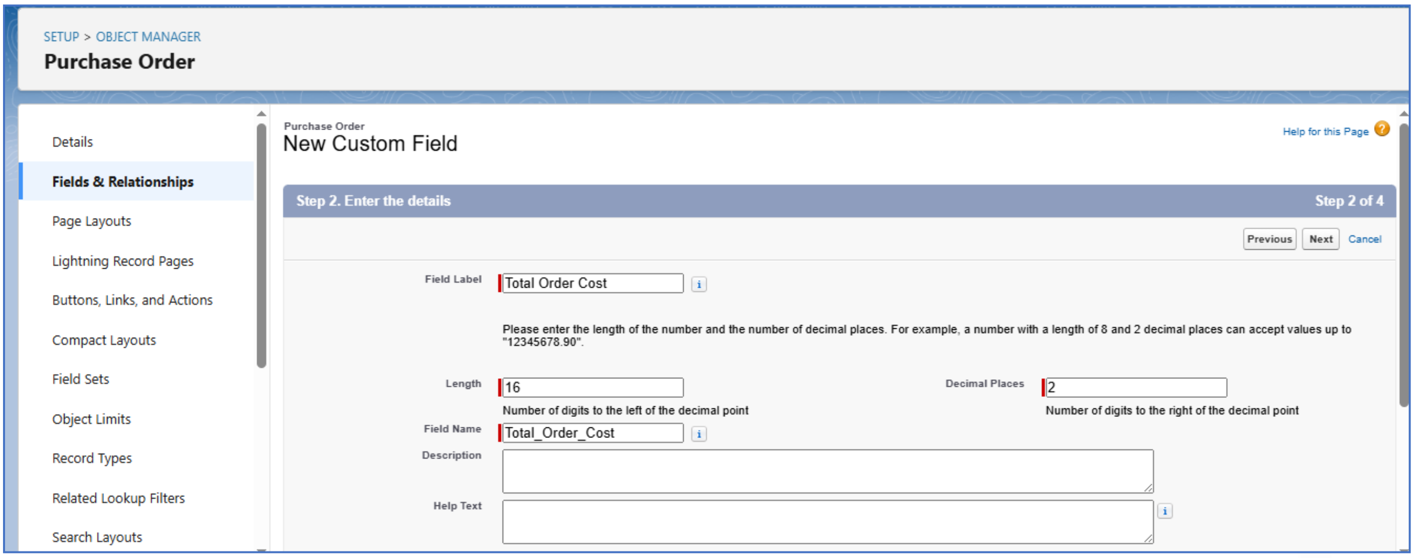
6. Choose the Summarized Object as "Order Items".
7. For Select Roll-Up Type select "Count".

8. Click on Next, Next and Save.

Activity 6: Creating a Currency Field in Product object

To create fields in an object:

1. Go to setup >> click on Object Manager >> type object name(Product) in quick find box >> click on the Product custom object.
2. Now click on "Fields & Relationships"
3. Click on New.
4. Select Data type as "Currency" and click Next.
5. Enter Field Label as "Total Order Cost".
6. Length - 16, Decimal Places - 2.
7. Select Required Field.



8. Click on Next, Next and Save.

Creating Fields in Order Item Object :

Order Item	Order Item ID(Standard)	Text
	Product ID	Lookup(Product)
	Purchase Order ID	Master-Detail(Purchase Order)
	Quantity Ordered	Number(18, 0)
	Quantity Received	Number(18, 0)
	Unit Price	Formula(Currency)
	Amount	Formula(Currency)

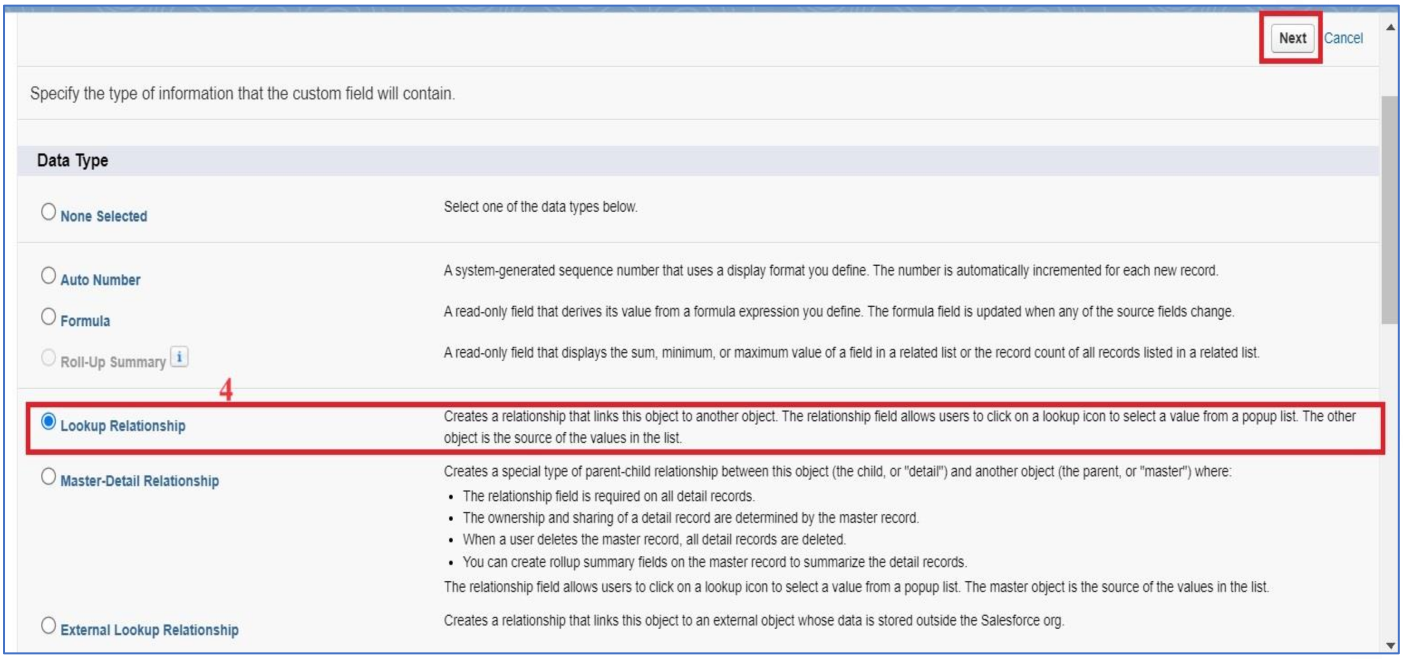
MEDICAL INVENTORY MANAGEMENT

Activity 1 : Creating Lookup Relationship in Order Item Object

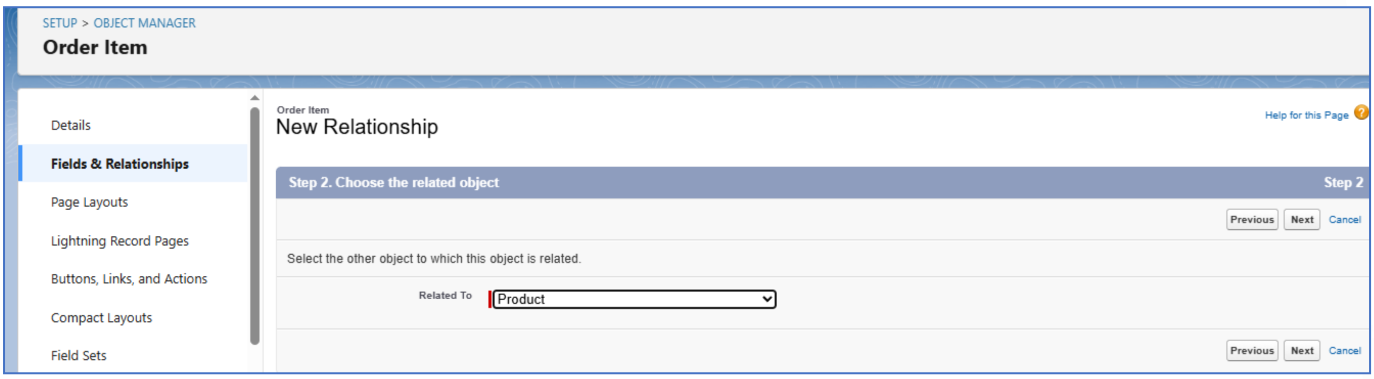
A Lookup relationship is a type of relationship in Salesforce that connects two objects together based on a field known as the Lookup field. It establishes a relationship between a child object and a parent object, allowing the child object to reference the parent object.

To Create a relationship from Order Item to Product .

1. Go to the Setup page >> click on Object manager >> type object name (Order Item) in the quick find bar >> click on the Order Item object.
2. Click on Fields & Relationship
3. Click on New.
4. Select "Lookup relationship" as data type and click Next.

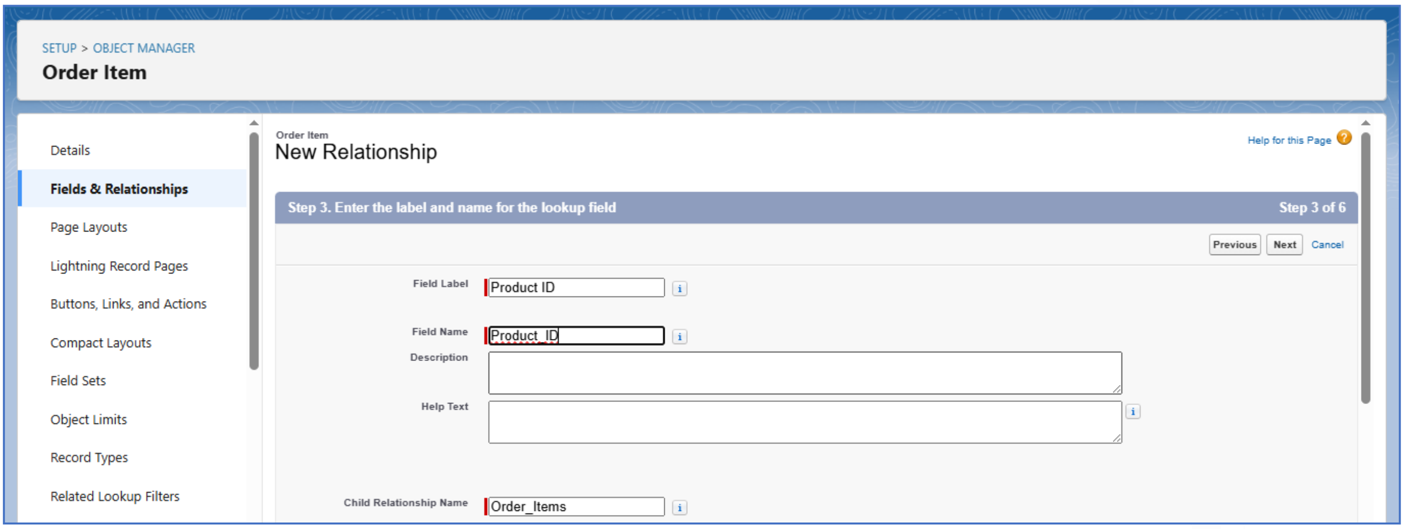


5. Select the related object " Product".



6. Click on Next.

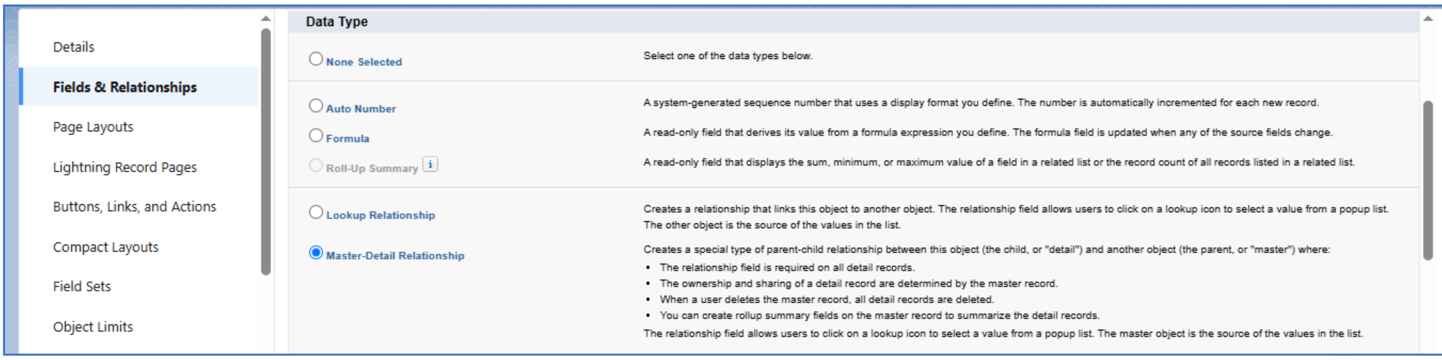
7. Give Field Label as "Product ID" .
8. Select Required Field



9. Click on Next, Next and Save.

Activity 2 : Creating Master-detail Relationship in Order Item Object

1. Go to the Setup page >> click on Object manager >> type object name(Order Item) in the quick find bar >> click on the Order Item object.
2. Click on Fields & Relationship
3. Click on New.
4. Select "Master-detail relationship" as data type and click Next.



5. Select the related object "Purchase Order".
6. Click on Next.
7. Give Field Label as "Purchase Order ID" .
8. Select Required Field
9. Click on Next, Next and Save.

Activity 3: Creating a Number Field in Order Item object

To create fields in an object:

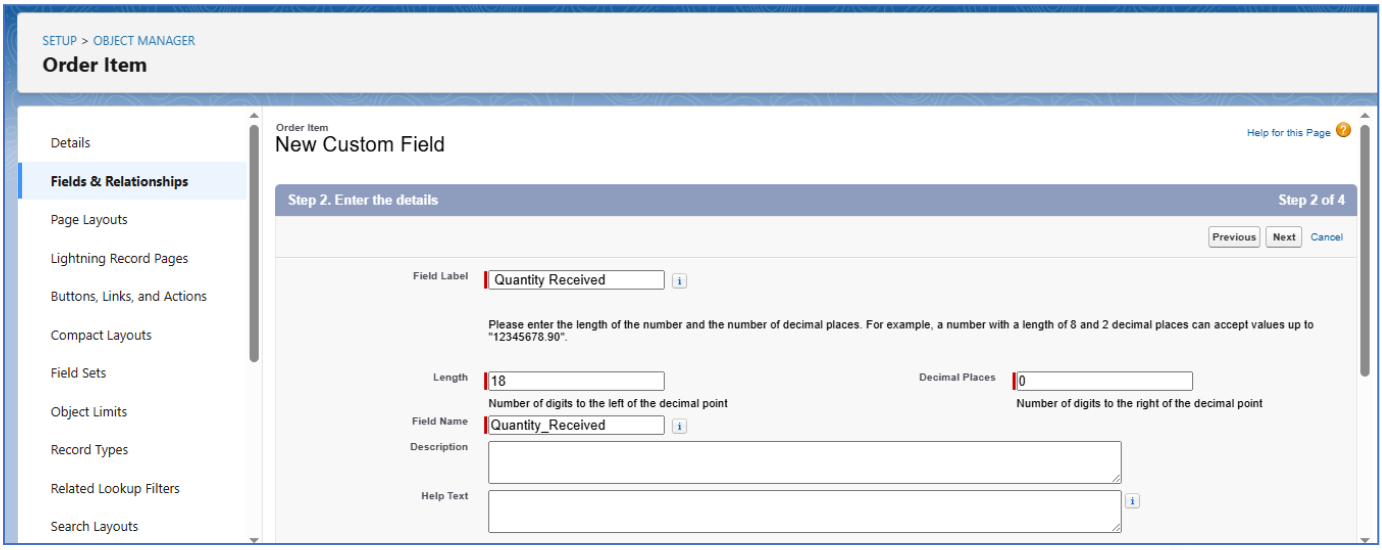
1. Go to setup >> click on Object Manager >> type object name(Order Item) in quick find box >> click on the Order Item custom object.
2. Now click on "Fields & Relationships"
3. Click on New.
4. Select Data type as "Number" and click Next.
5. Enter Field Label as "Quantity Ordered".
6. Length - 18, Decimal Places - 0.

7. Click on Next, Next and Save.

Activity 4: Creating a Number Field in Order Item object

To create fields in an object:

1. Go to setup >> click on Object Manager >> type object name(Order Item) in quick find box >> click on the Order Item custom object.
2. Now click on "Fields & Relationships"
3. Click on New.
4. Select Data type as "Number" and click Next.
5. Enter Field Label as "Quantity Recieved".
6. Length - 18, Decimal Places - 0.



7. Click on Next, Next and Save

Activity 5: Creating a Unit Price Formula Field in Order Item object

To create fields in an object:

1. Go to setup >> click on Object Manager >> type object name(Order Item) in quick find box >> click on the Order Item object.
2. Now click on "Fields & Relationships"
3. Click on New.
4. Select Data type as "Formula" and click Next.
5. Enter field label Unit Price.
6. Select formula return type Currency, Click Next

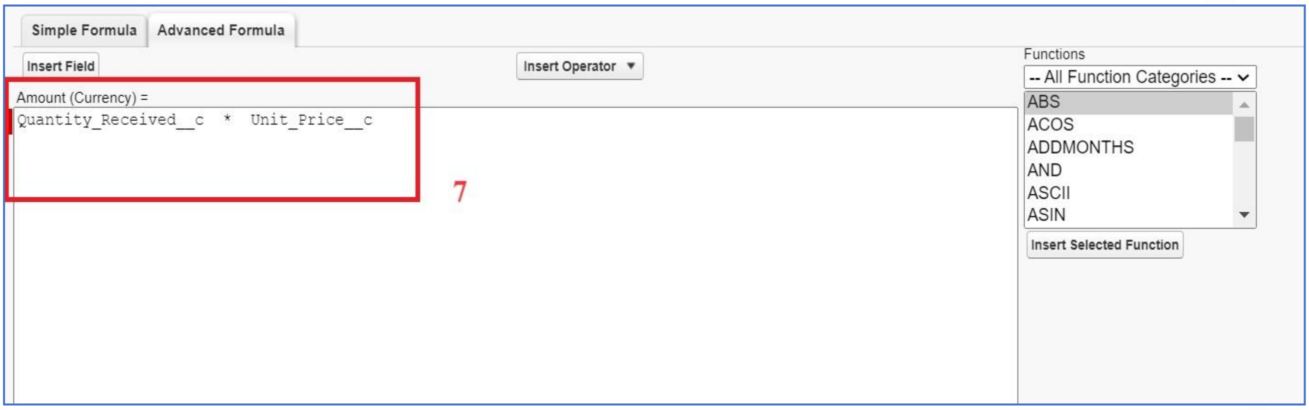
7. Create and insert Advance formula: Product_ID__r.Unit_Price__c

8. Click on Next, Next and Save

Activity 6: Creating a Amount Formula Field in Order Item object

To create fields in an object:

1. Go to setup >> click on Object Manager >> type object name(Order Item) in quick find box >> click on the Order Item object.
2. Now click on “Fields & Relationships”
3. Click on New.
4. Select Data type as “Formula” and click Next.
5. Enter field label Amount.
6. Select formula return type Currency, Click Next
7. Create and insert Advance formula: Quantity_Received__c * Unit_Price__c



8. Click Next, Next, then Save.

Create fields in Inventory Management Object

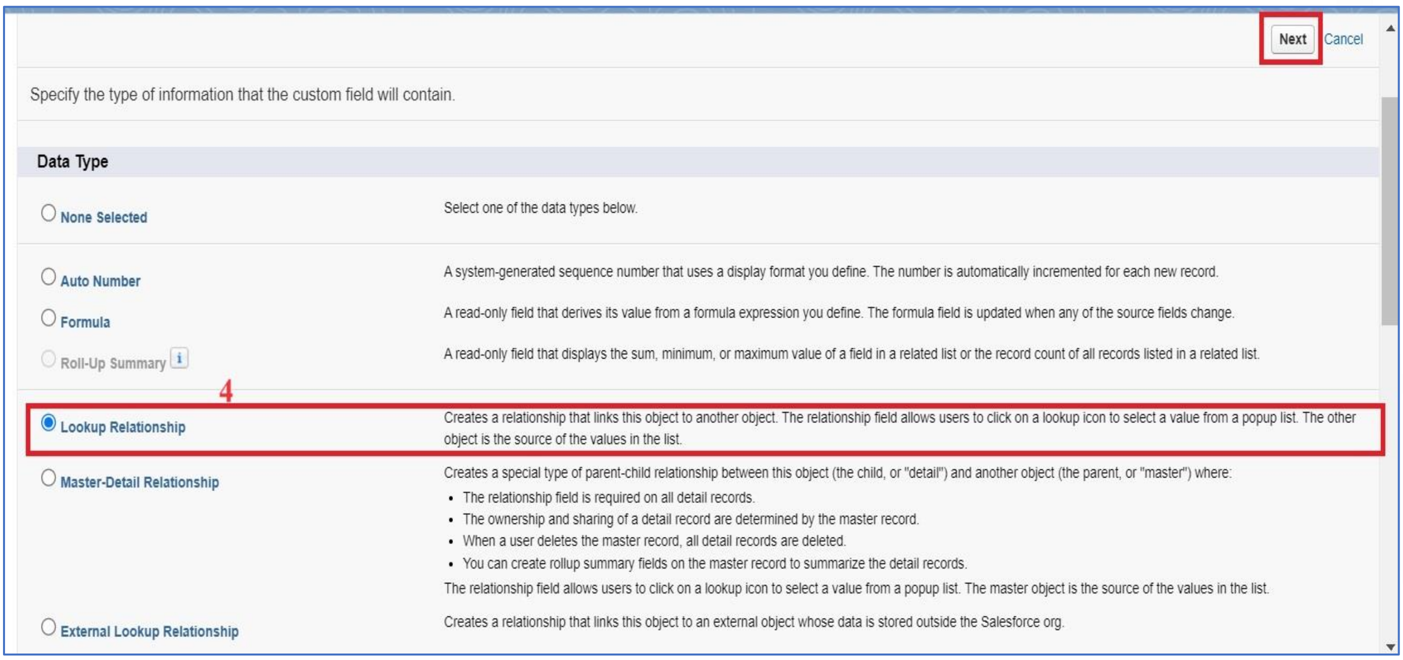
Inventory Transaction	Transaction ID(Standard)	Text
	Purchase Order ID	Lookup(Purchase Order)
	Transaction Date	Date
	Transaction Type	Picklist
	Total Order Cost	Formula(Currency)

Activity 1 : Creating Lookup Relationship in Inventory Management Object

A Lookup relationship is a type of relationship in Salesforce that connects two objects together based on a field known as the Lookup field. It establishes a relationship between a child object and a parent object, allowing the child object to reference the parent object.

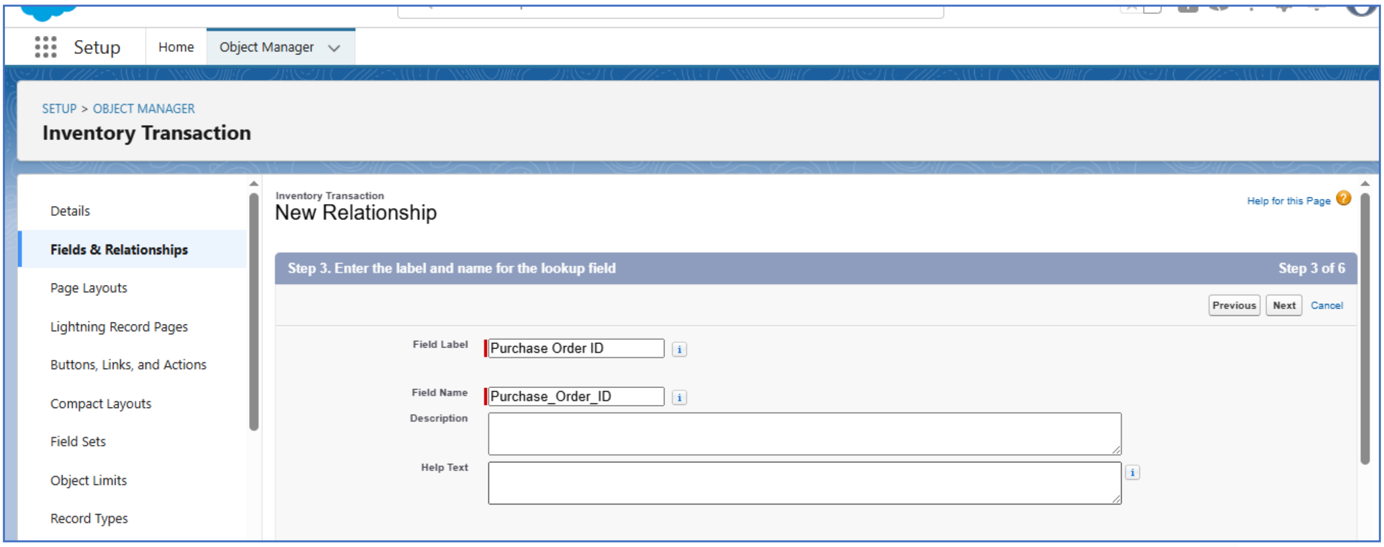
To Create a relationship from Inventory Management to Purchase Order .

1. Go to the Setup page >> click on Object manager >> type object name (Inventory Management) in the quick find bar >> click on the Inventory Management object.
2. Click on Fields & Relationship
3. Click on New.
4. Select "Lookup relationship" as data type and click Next.



5. Select the related object " Purchase Order".

6. Click on Next.
7. Give Field Label as “Purchase Order ID” .
8. Select Required Field.

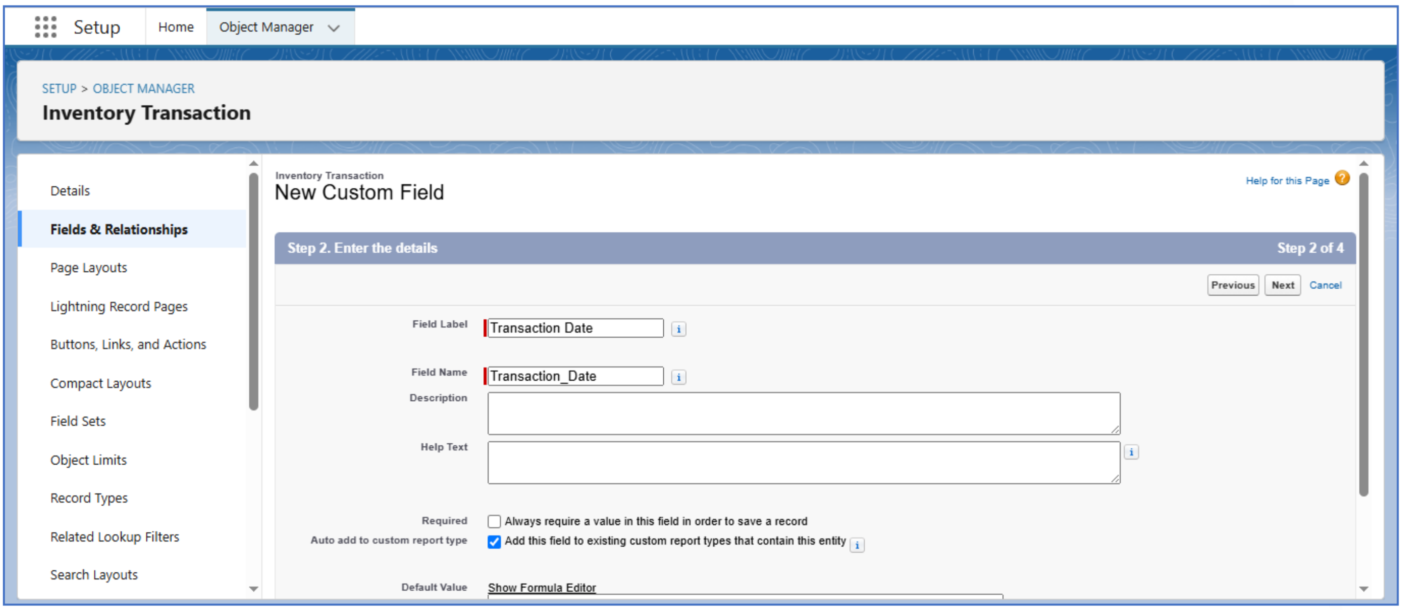


9. Click Next, Next, then Save.

Activity 2: Creating a Date Field in Inventory Transaction object

To create fields in an object:

1. Go to setup >> click on Object Manager >> type object name(Inventory Transaction) in quick find box >> click on the Inventory Managemnet object.
2. Now click on “Fields & Relationships”
3. Click on New.
4. Select Data type as “Date” and click Next.
5. Enter field label Transaction Date

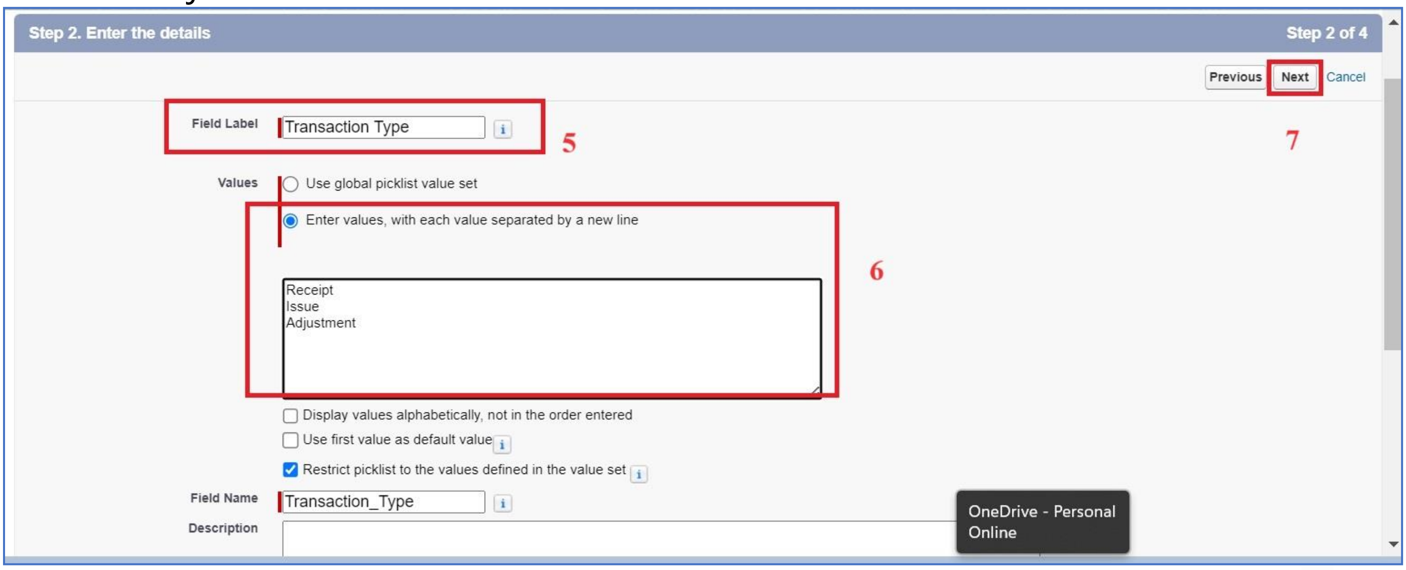


6. Click Next, Next, then Save.

Activity 3: Creating a Picklist Field in Inventory Transaction Object

To create fields in an object:

1. Go to setup >> click on Object Manager >> type object name(Inventory Transaction) in quick find box>> click on the Inventory Transaction Object.
2. Now click on "Fields & Relationships" .
3. Click on New.
4. Select Data type as "Picklist" and click Next.
5. Enter Field Label as "Transaction Type".
6. In values select "Enter values, with each value separated by a new line" and enter values as shown below.
    - Receipt
    - Issue
    - Adjustment



7. Click Next, Next, then Save.

Activity 4: Creating a Total Order Cost Formula Field in Inventory Transaction object

To create fields in an object:

1. Go to setup >> click on Object Manager >> type object name(Inventory Transaction) in quick find box >> click on the Order Item object.
2. Now click on "Fields & Relationships"
3. Click on New.
4. Select Data type as "Formula" and click Next.
5. Enter field label Total Order Cost.
6. Select formula return type Currency, Click Next

7. Create and insert Advance formula: Purchase_Order_ID__r.Total_Order_Cost__c

8. Click Next, Next, then Save.

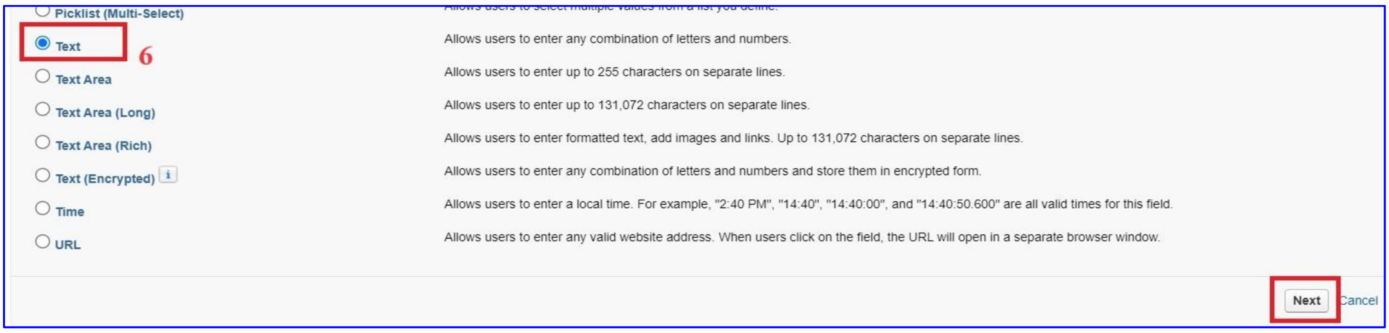
Creating fields for Supplier object

Supplier	Supplier ID(Standard)	Text
	Supplier Name	Text
	Contact Person	Text
	Phone Number	Phone
	Email	Email
	Address	TextArea

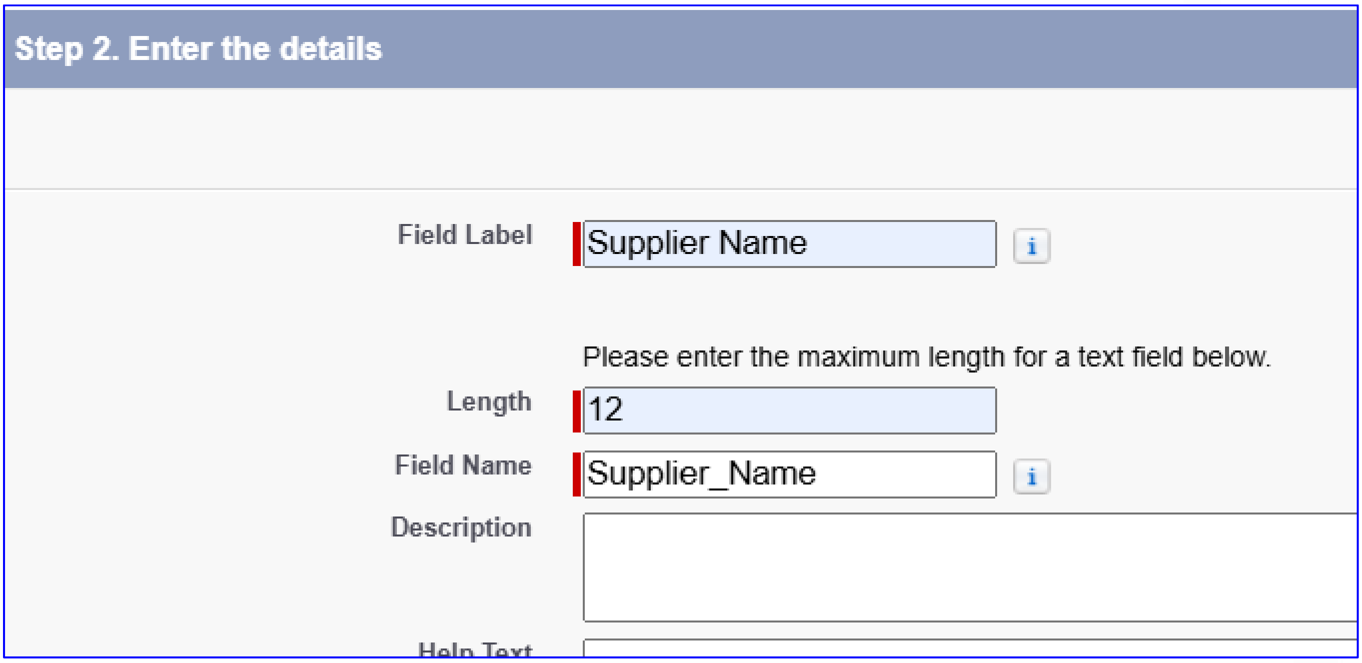
Activity 1: Creating a Text Field in Supplier object

To create fields in an object:

1. Click the gear icon and select Setup. This launches Setup in a new tab.
2. Click the Object Manager tab next to Home.
3. Select Supplier custom object.
4. Select Fields & Relationships from the left navigation
5. Click on New
6. Select Text field, click Next



7. Enter Field Label as "**Supplier Name**" and Length 12.
8. Select Required Field.

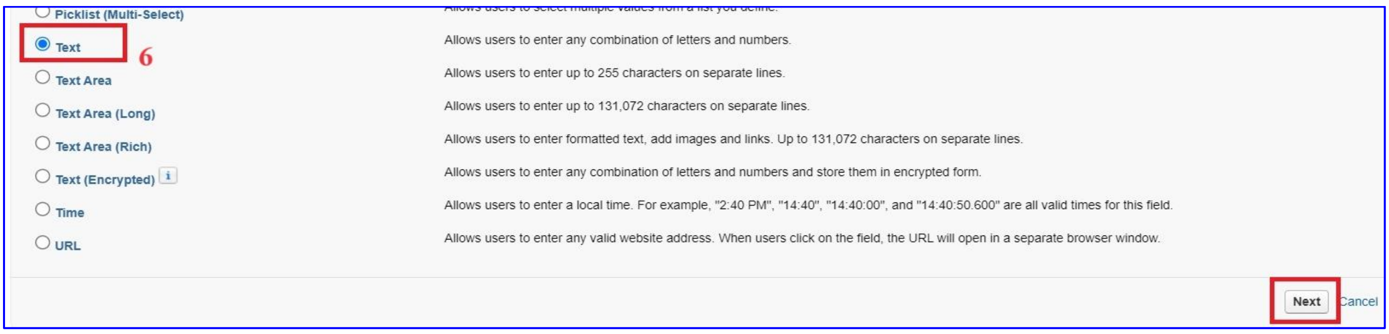


9. Click Next, Next, then Save.

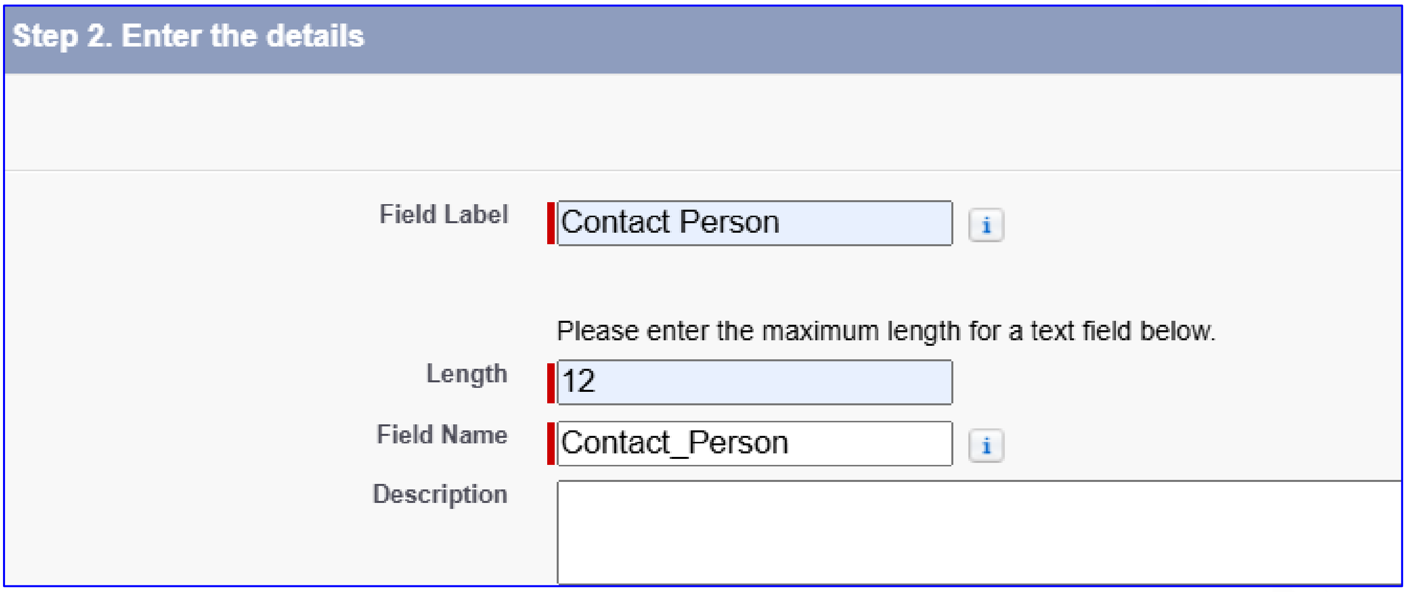
Activity 2: Creating a Text Field in Supplier object

To create fields in an object:

1. Click the gear icon and select Setup. This launches Setup in a new tab.
2. Click the Object Manager tab next to Home.
3. Select Supplier custom object.
4. Select Fields & Relationships from the left navigation
5. Click on New
6. Select Text field, click Next



7. Enter Field Label as "**Contact Person**" and Length 12.
8. Select Required Field.

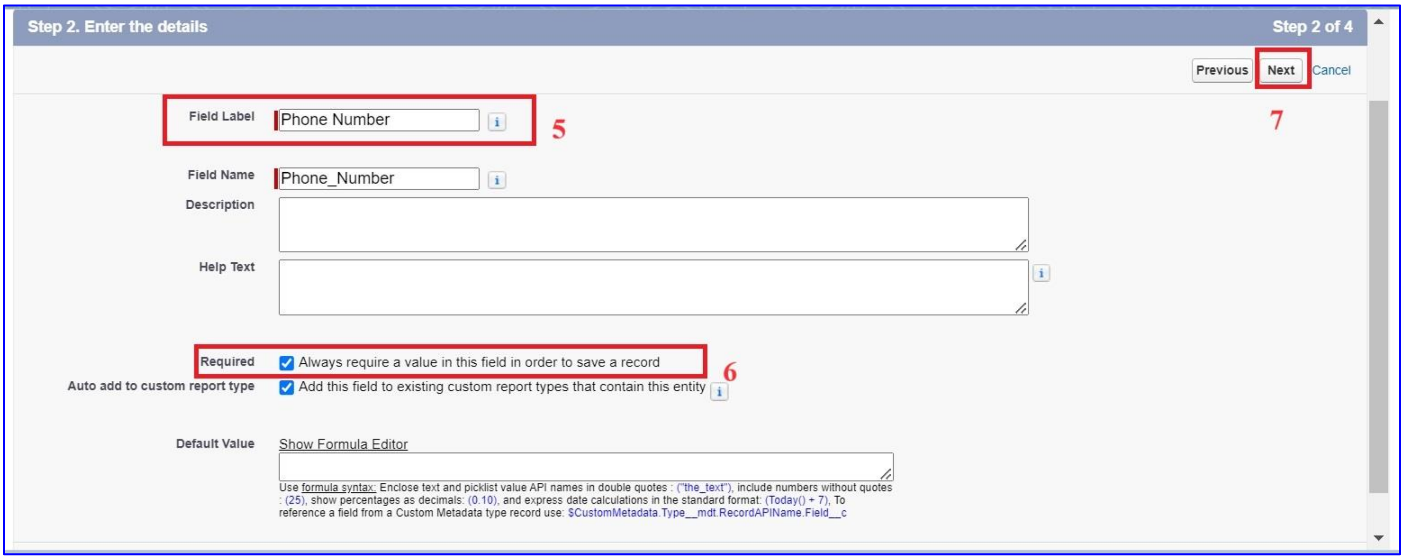


9. Click Next, Next, then Save.

Activity 3: Creating a Phone Field in Supplier object

To create fields in an object:

1. Go to setup >> click on Object Manager >> type object name(Supplier) in quick find box>> click on the Supplier object.
2. Now click on "Fields & Relationships"
3. Click on New.
4. Select Data type as "Phone" and click Next.
5. Enter the Field Label as " **Phone Number**".
6. Select Required Field.

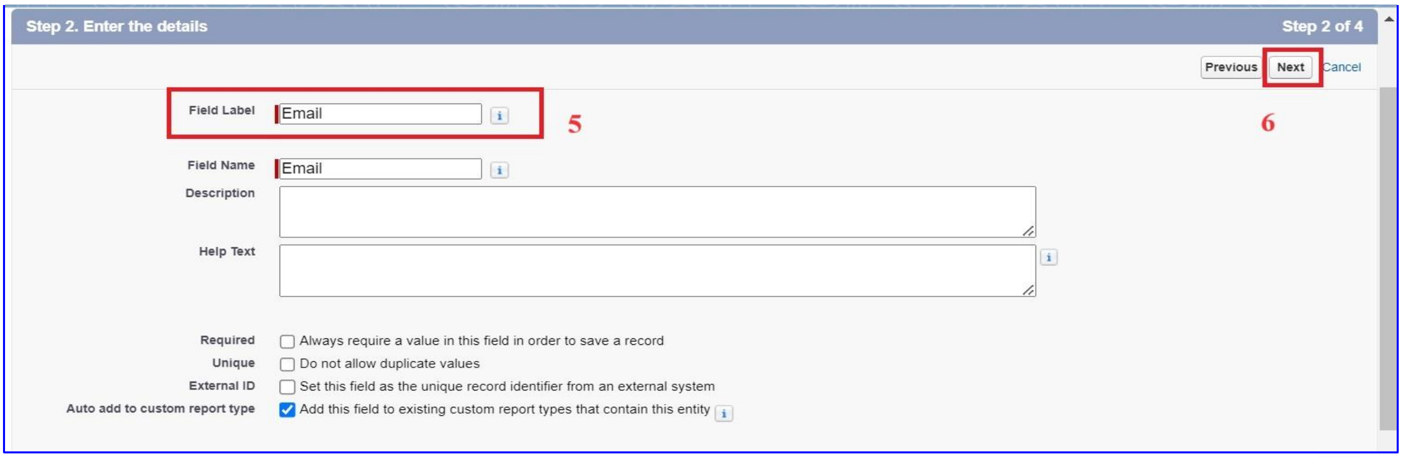


7. Click on Next, Next and Save.

Activity 4: Creating a Email Field in Supplier object

To create fields in an object:

1. Go to setup >> click on Object Manager >> type object name(Supplier) in quick find box>> click on the Supplier object.
2. Now click on "Fields & Relationships"
3. Click on New.
4. Select Data type as "Email" and click Next.
5. Enter the Field Label as " **Email**".

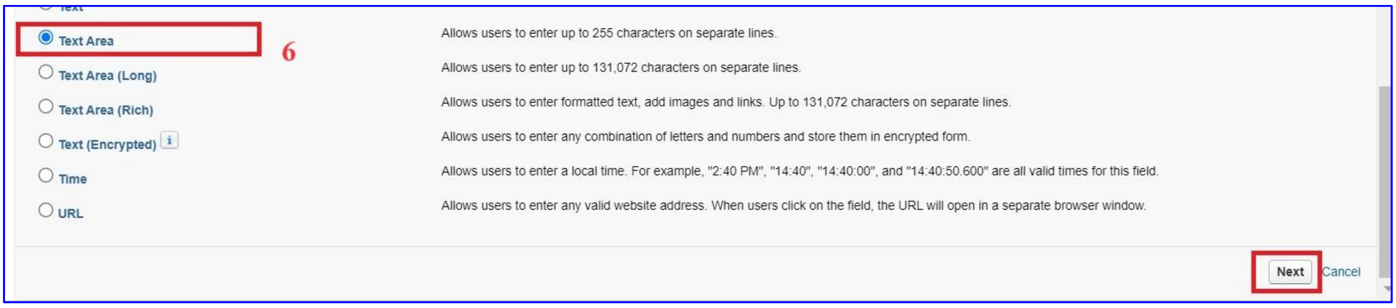


6. Click on Next, Next and Save.

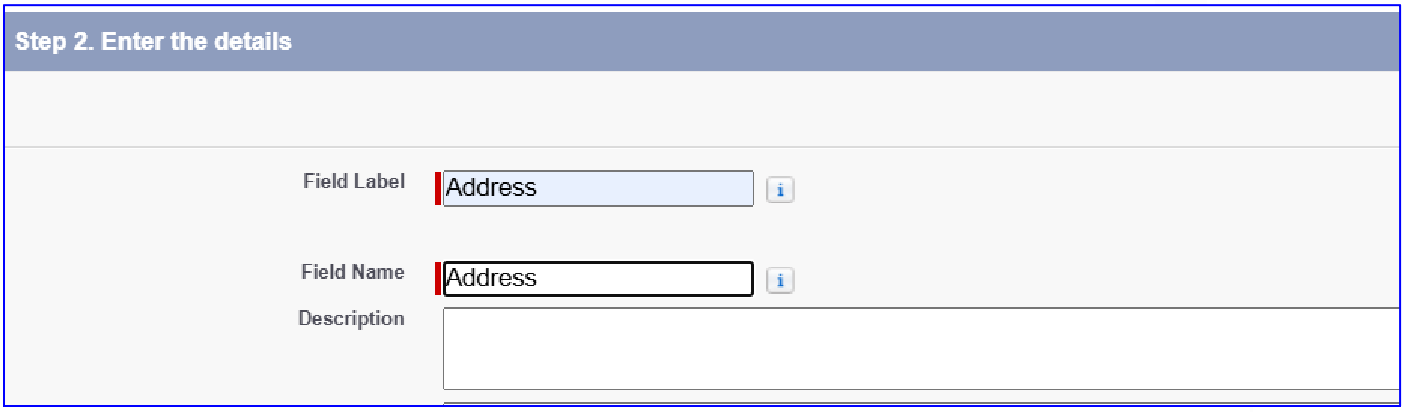
Activity 5: Creating a Text Area Field in Supplier object

To create fields in an object:

1. Click the gear icon and select Setup. This launches Setup in a new tab.
2. Click the Object Manager tab next to Home.
3. Select Supplier custom object.
4. Select Fields & Relationships from the left navigation
5. Click on New
6. Select TextArea field, click Next



7. Enter Field Label as "**Address**" .



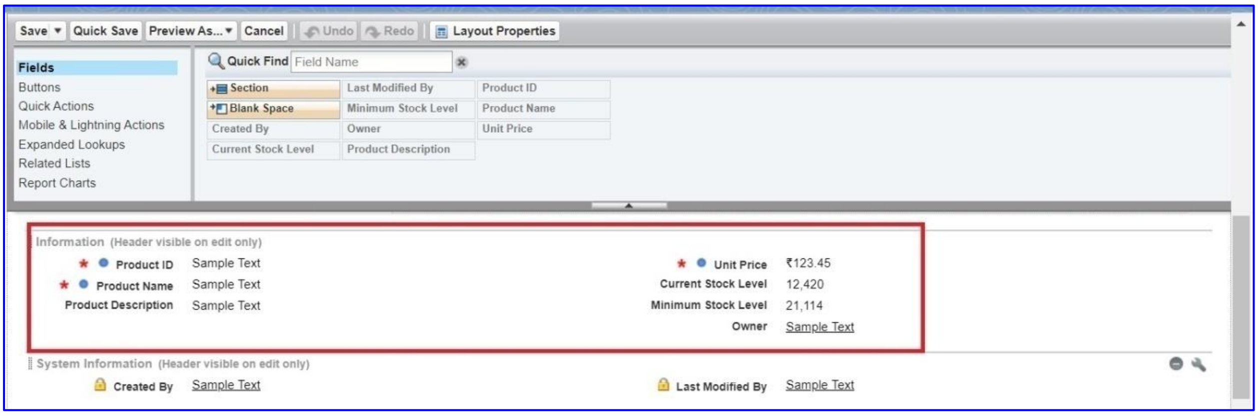
8. Click on next,next, then Save.

MEDICAL INVENTORY MANAGEMENT
Milestone-6

Editing of Page Layouts

Activity 1: To edit a Page Layout in Product Object

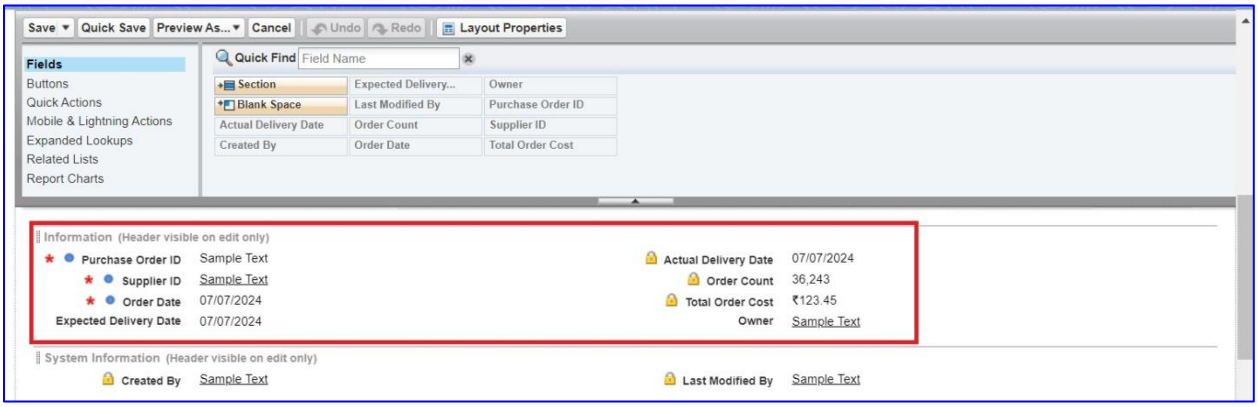
1. Go to setup >> click on Object Manager >> type object name(**Product**) in quick find box >> click on the Product object >> Page Layouts .
2. Click on the Product Layout.
3. Drag and Arrange the field as shown below.



4. Click on Save.

Activity 2: To edit a Page Layout in Purchase Order Object

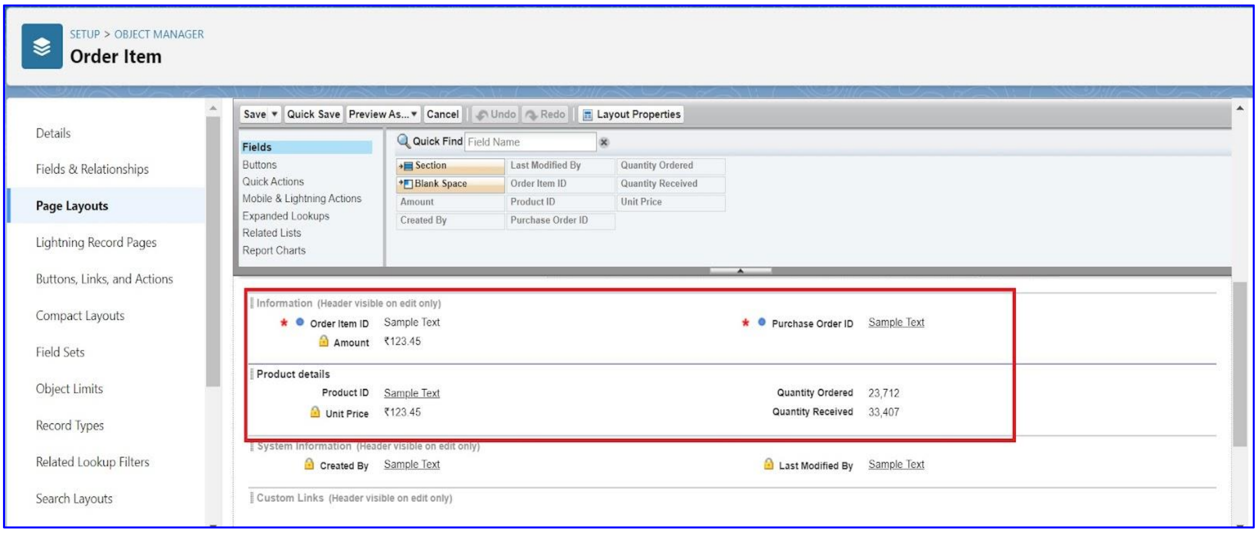
1. Go to setup >> click on Object Manager >> type object name(**Purchase Order**) in quick find box >> click on the Purchase Order object >> Page Layouts.
2. Click on the Purchase Order Layout
3. Drag and Arrange the field as shown below



4. Click on field Order Date >> click on settings >> select Required and save it.
5. Click on field Total Order Cost >> click on settings >> select Read Only and save it.
6. Click Save.

Activity 3: To edit a Page Layout in Order Item Object

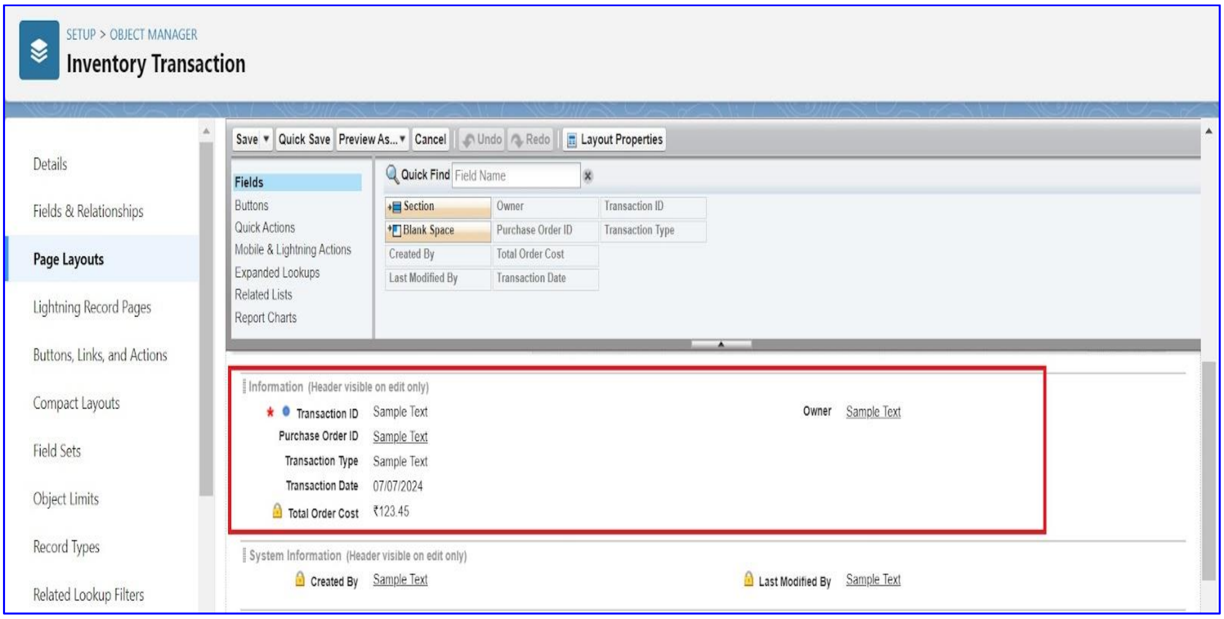
1. Go to setup >> click on Object Manager >> type object name(**Order Item**) in quick find box >> click on the Order Item object >> Page Layouts.
2. Click on the Order Item Layout
3. Drag and Arrange the field as shown below



4. Click Save.

Activity 4: To edit a Page Layout in Inventory Transaction Object

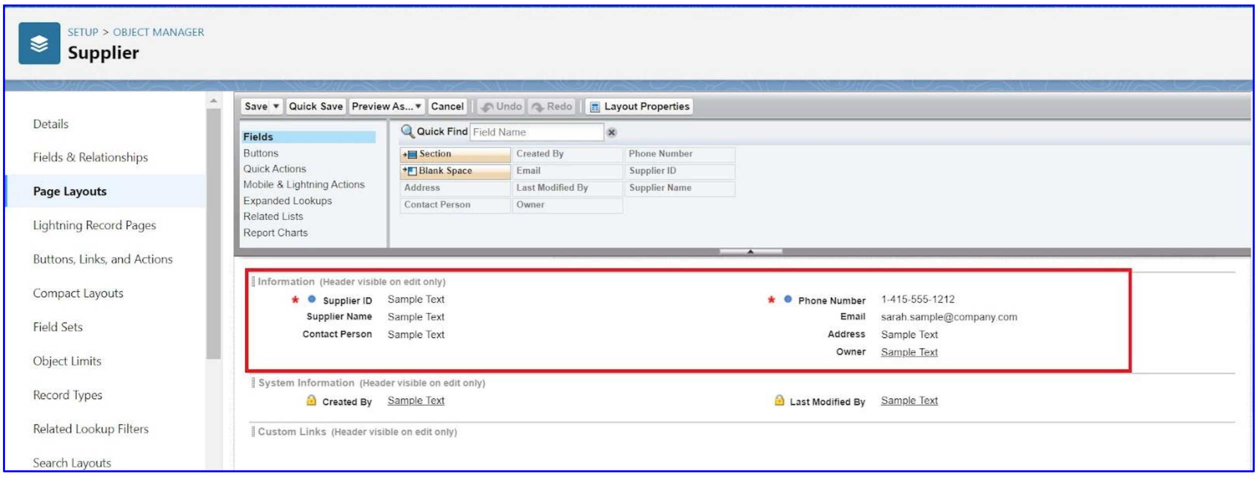
1. Go to setup >> click on Object Manager >> type object name(**Inventory Transaction**) in quick find box >> click on the Inventory Transaction object >> Page Layouts.
2. Click on the Inventory Transaction Layout
3. Drag and Arrange the field as shown below



4. Click Save.

Activity 5: To edit a Page Layout in Supplier Object

1. Go to setup >> click on Object Manager >> type object name(**Supplier**) in quick find box >> click on the Supplier object >> Page Layouts.
2. Click on the Supplier Layout
3. Drag and Arrange the field as shown below



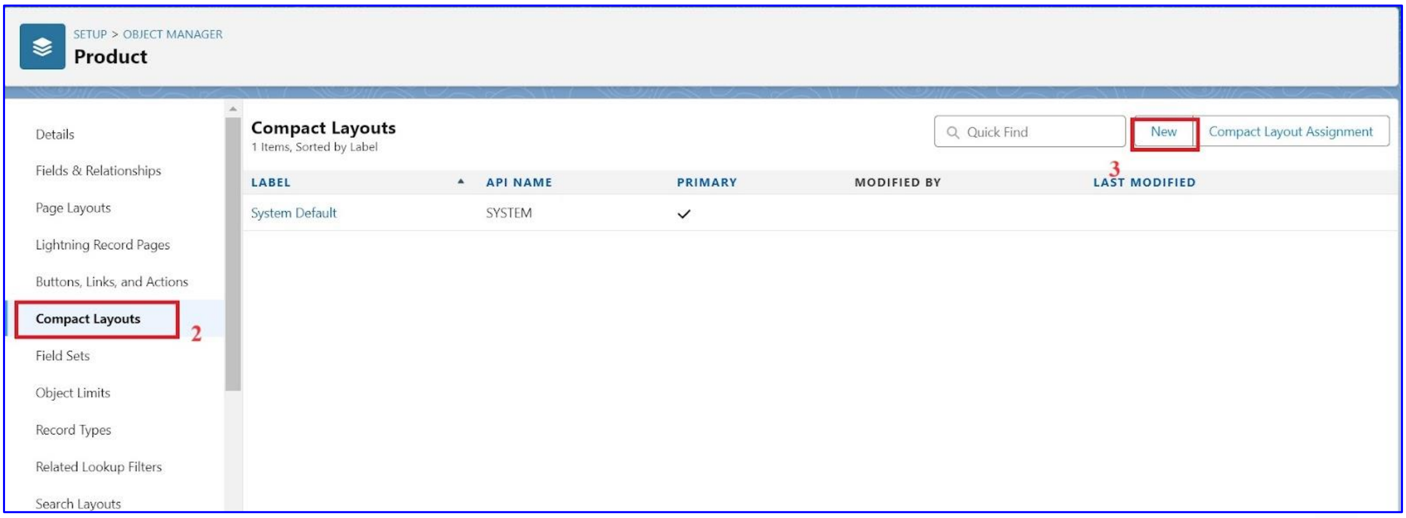
4. Click Save.

MEDICAL INVENTORY MANAGEMENT
Milestone-7

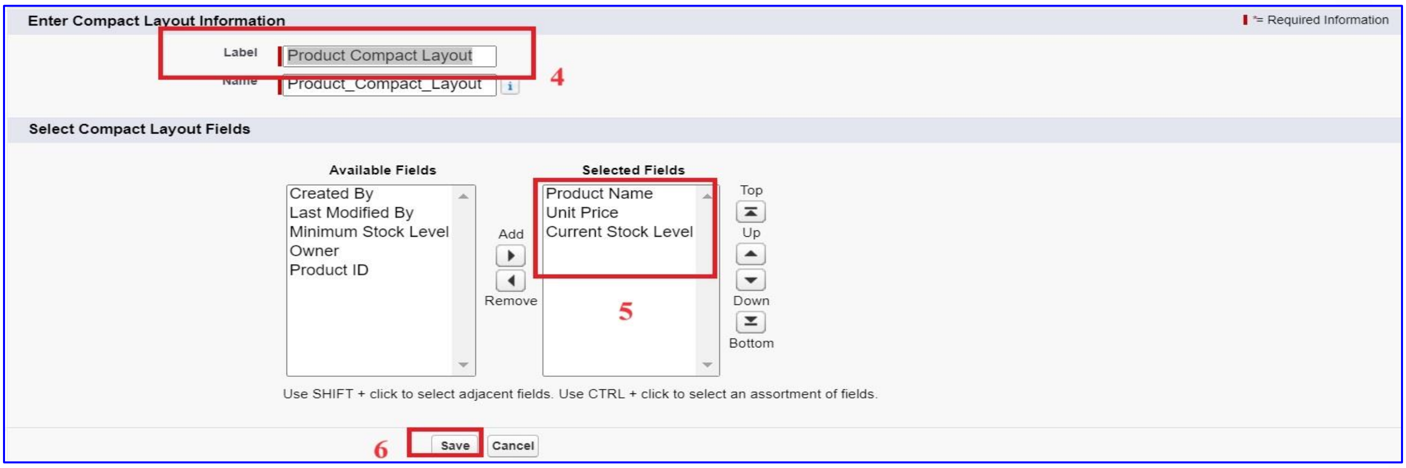
Compact Layouts Creation

Activity 1: To create a Compact Layout to a Product Object

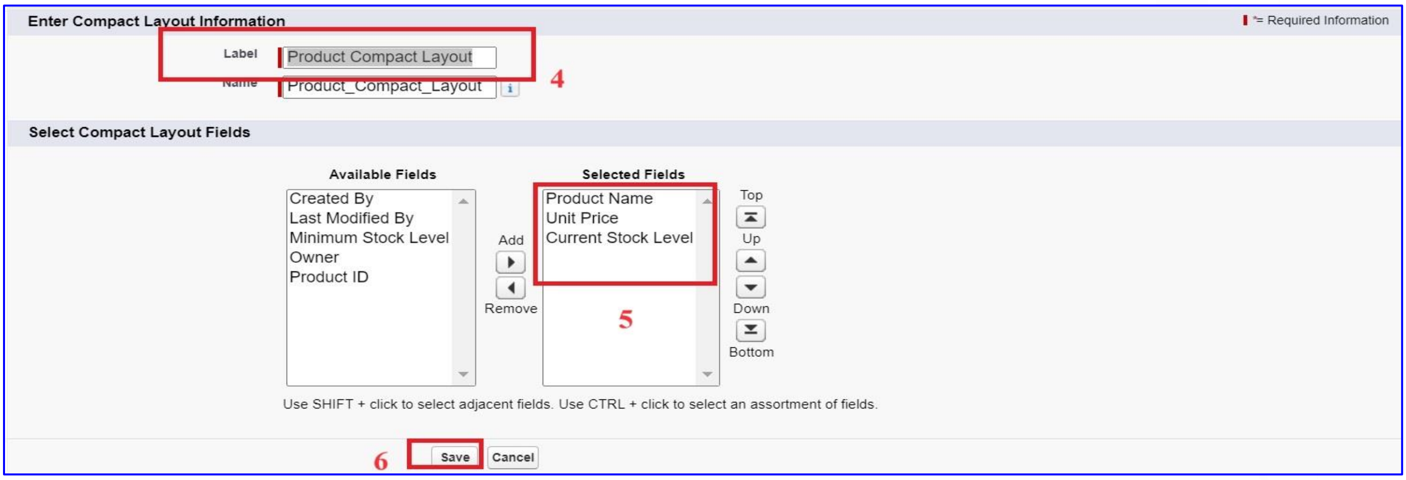
1. Go to setup >> click on Object Manager >> type object name(**Product**) in quick find box >> click on the Product object
2. Click on Compact Layouts in the sidebar .
3. Click on New.



4. Enter the Label as “**Product Compact Layout**”.
5. Select the Compact Layout Fields : Select Product name, Unit Price, Current Stock Level.
6. Click Save.

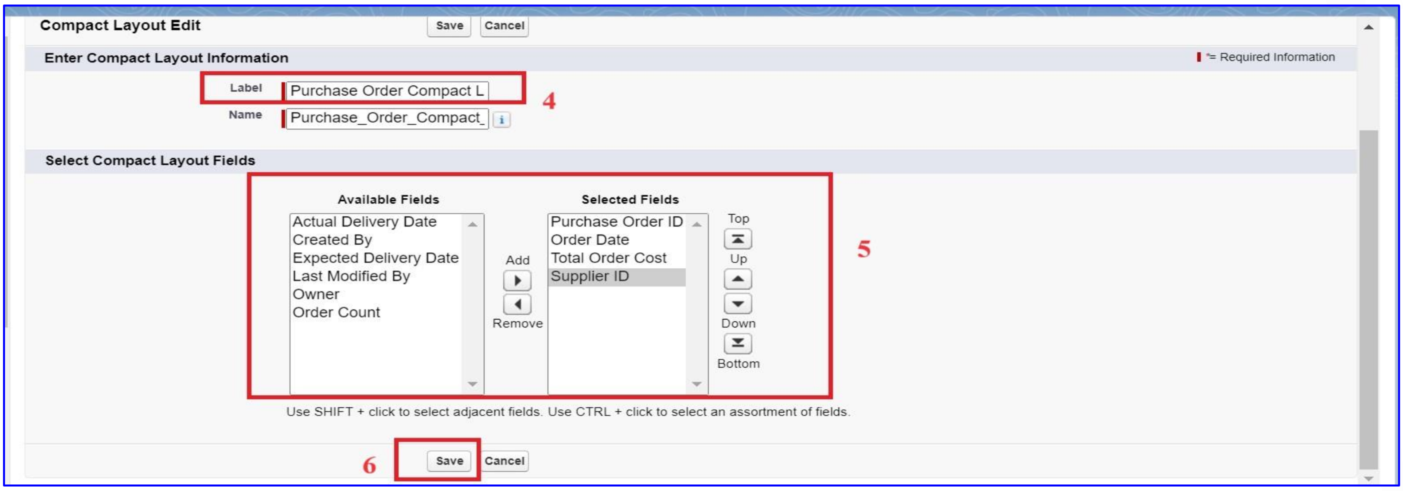


7. Click Compact Layout Assignment.
8. Click Edit Assignment.
9. Choose "Product Compact Layout" from the dropdown.
10. Click Save



Activity 2: To create a Compact Layout to a Purchase Order Object

1. Go to setup >> click on Object Manager >> type object name(**Purchase Order**) in quick find box >> click on the Purchase Order object
2. Click on Compact Layouts in the sidebar .
3. Click on New.
4. Enter the Label as "**Purchase Order Compact Layout**".
5. Select the Compact Layout Fields : Select Purchase Order ID, Order Date, Total Order Cost, Supplier ID.
6. Click Save.



7. Click Compact Layout Assignment.
8. Click Edit Assignment.
9. Choose "Purchase Order Compact Layout" from the dropdown.
10. Click Save.

MEDICAL INVENTORY MANAGEMENT

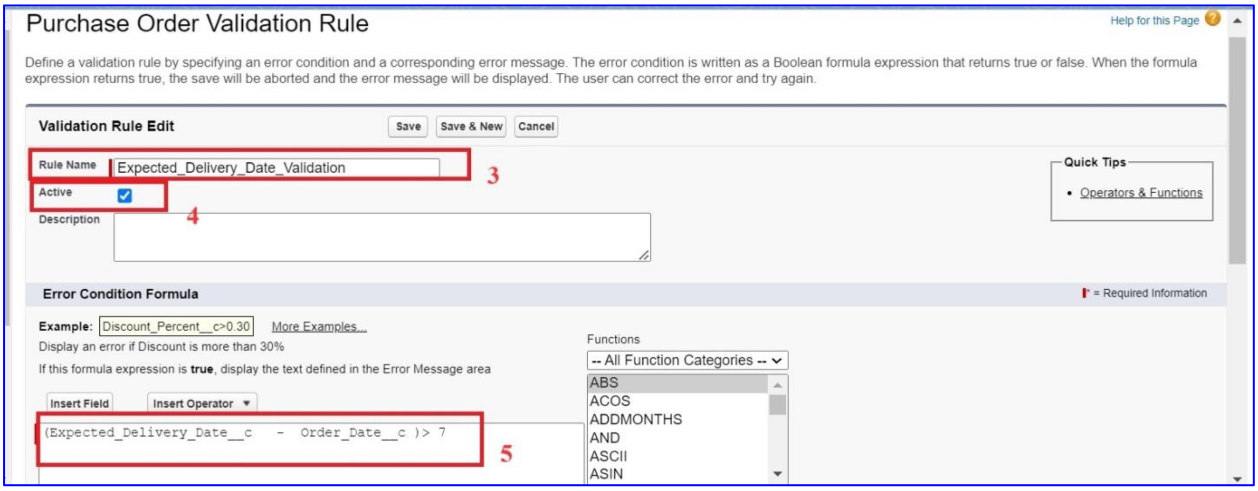
Milestone-8

Validation Rules Creation

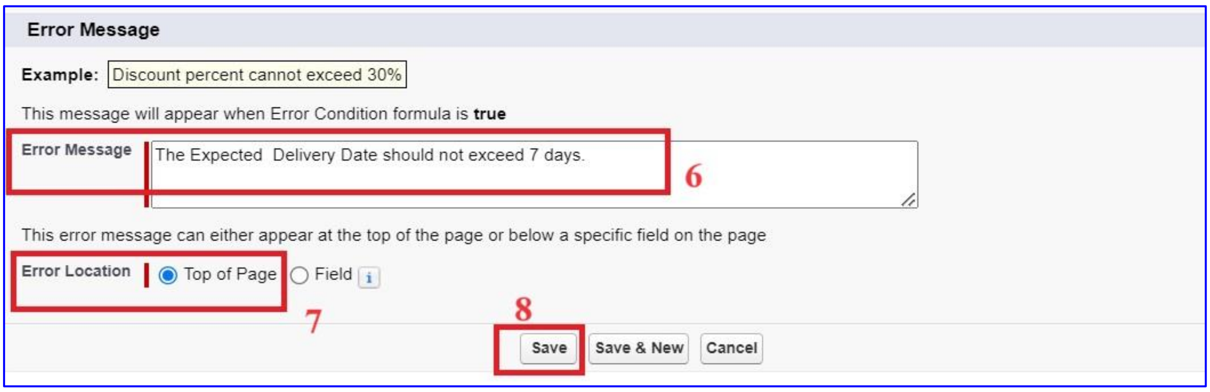
Activity 1: To create an Expected Delivery Date Validation rule to a Purchase Order Object

1. Go to setup >> click on Object Manager >> type object name(**Purchase Order**) in quick find box>> click on the Purchase Order object.
2. Click on the validation rule >> click on New.
3. Enter the Rule name as “**Expected Delivery Date Validation**”.
4. Select Active.
5. Insert the Error Condition Formula as :

   (Expected_Delivery_Date__c - Order_Date__c)> 7



6. Enter the Error Message as “The Expected Delivery Date should not exceed 7 days.”.
7. Select the Error location as Top of Page
8. Click Save.

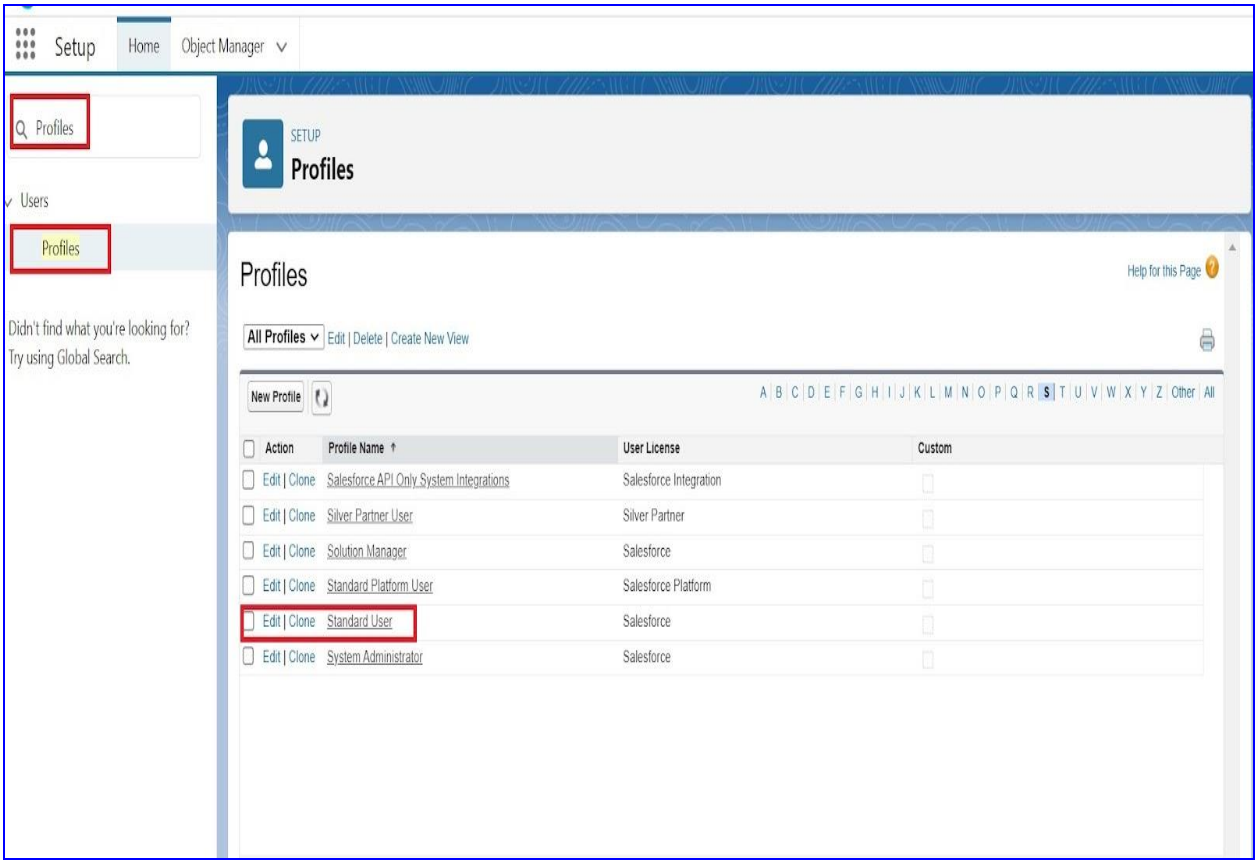


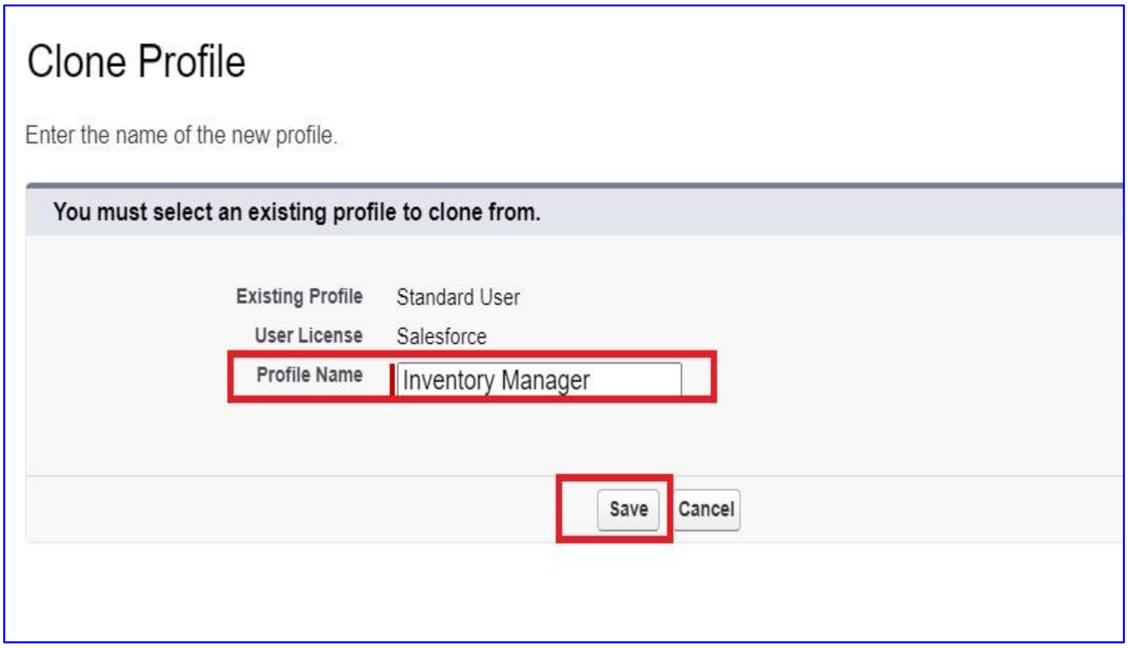
Milestone-9

Profiles Creation

Activity 1: To create an Inventory Manager Profile

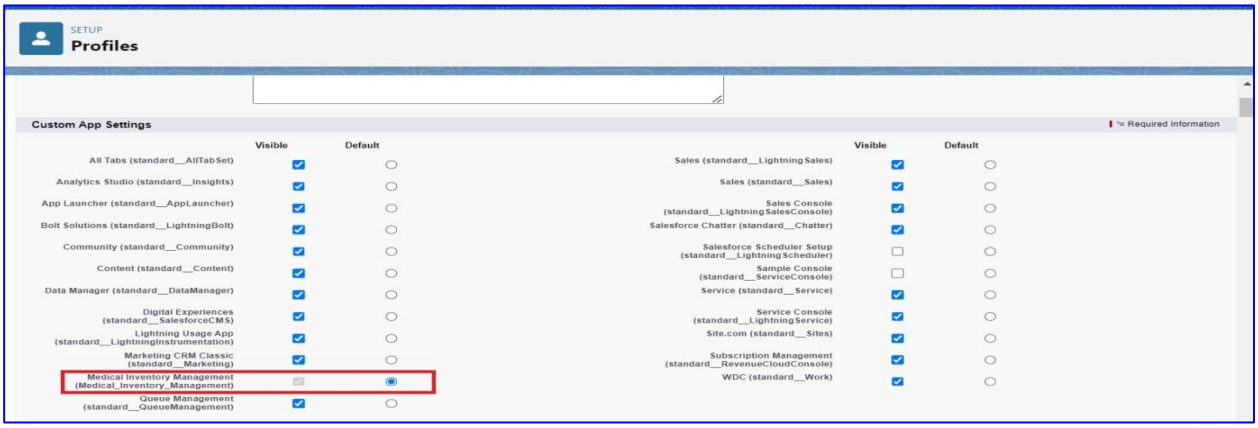
1. Go to setup >> type profiles in quick find box >> click on profiles >> clone the desired profile (Standard User) >> enter profile name (**Inventory Manager**) >> Save.



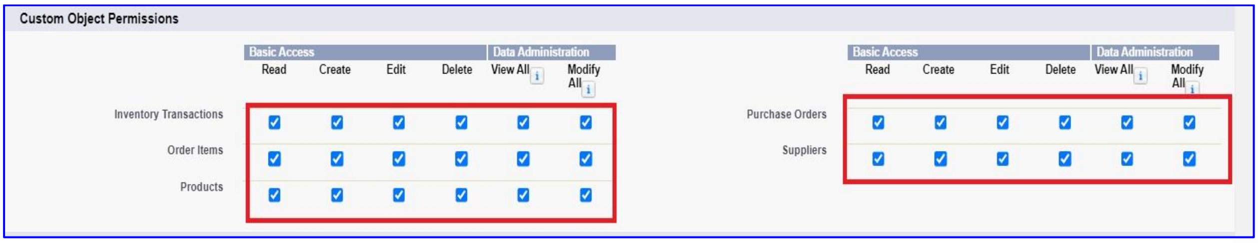


2. While still on the profile page, then click Edit.

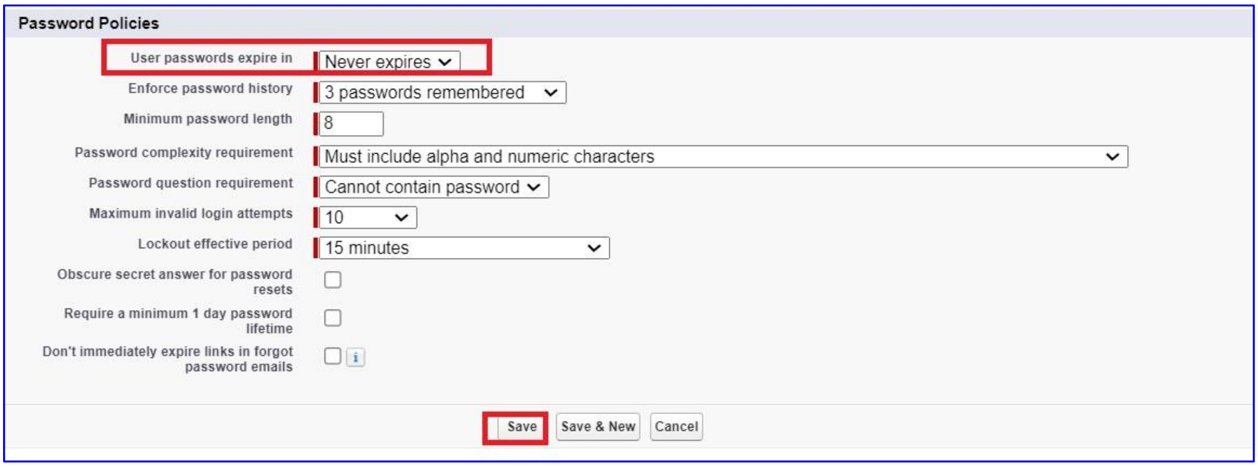
3. Select the Custom App settings as default for the Medical Inventory Management.



4. Scroll down to Custom Object Permissions and Give access permissions as mentioned in the below diagram.

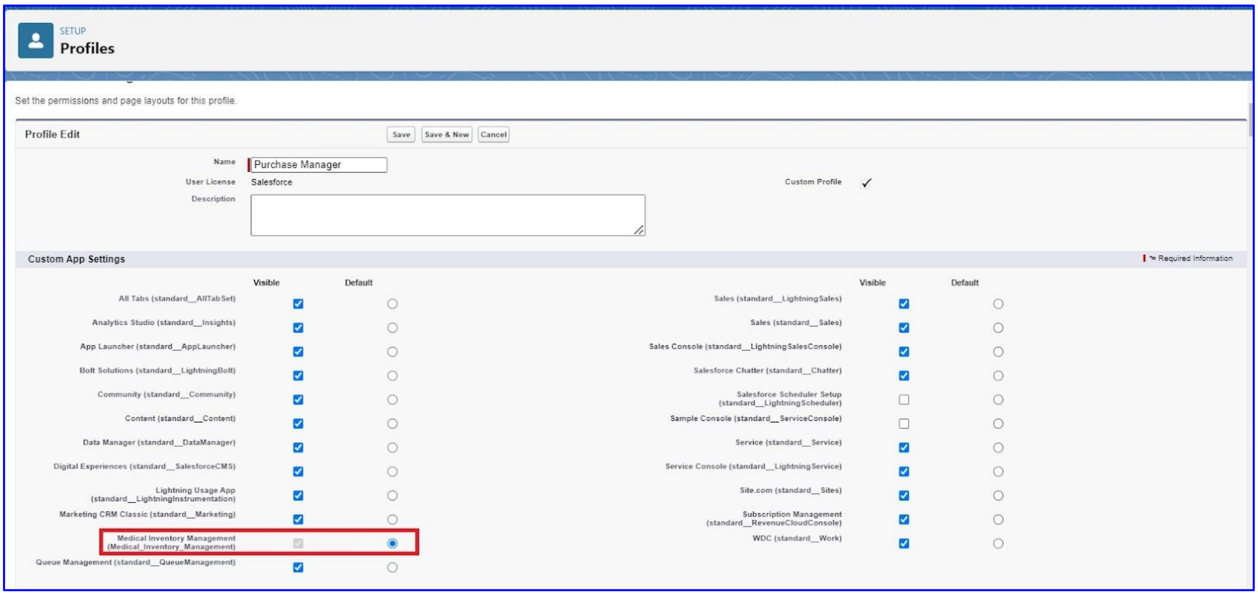


5. Change the password policies as mentioned :
6. User passwords expire in should be “ never expires ”.
7. Minimum password length should be “ 8 ”, and click save.

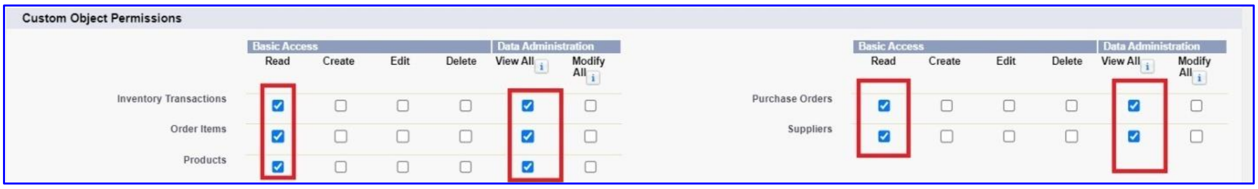


Activity 2: To create an Purchase Manager Profile

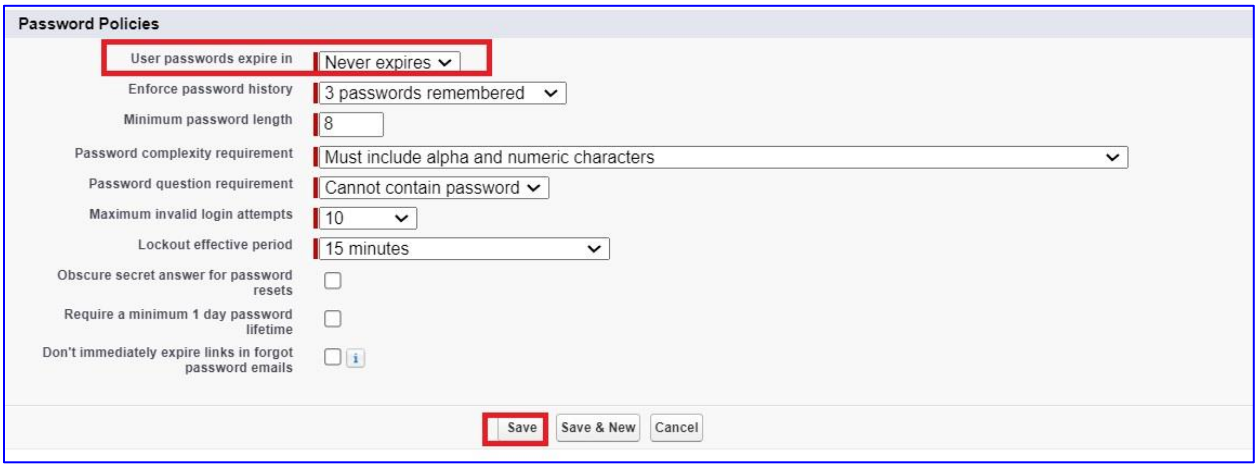
1. Go to setup >> type profiles in quick find box >> click on profiles >> clone the desired profile (Standard User) >> enter profile name (**Purchase Manager**) >> Save.
2. While still on the profile page, then click Edit.
3. Select the Custom App settings as default for the Medical Inventory Management.



4. Scroll down to Custom Object Permissions and Give access permissions as mentioned in the below diagram.



5. Change the password policies as mentioned :
6. User passwords expire in should be " never expires ".
7. Minimum password length should be " 8 ", and click save.

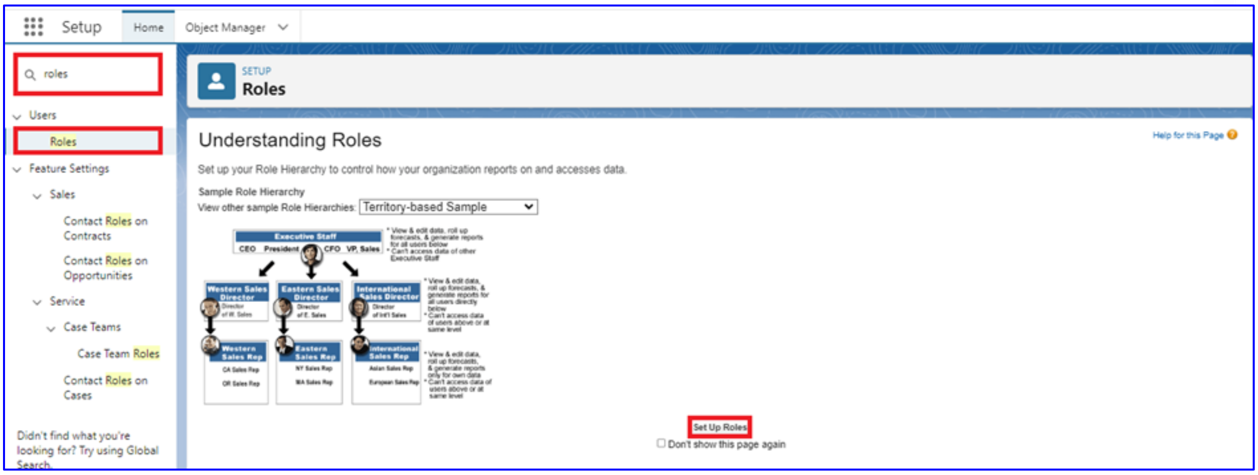


MEDICAL INVENTORY MANAGEMENT
Milestone-10

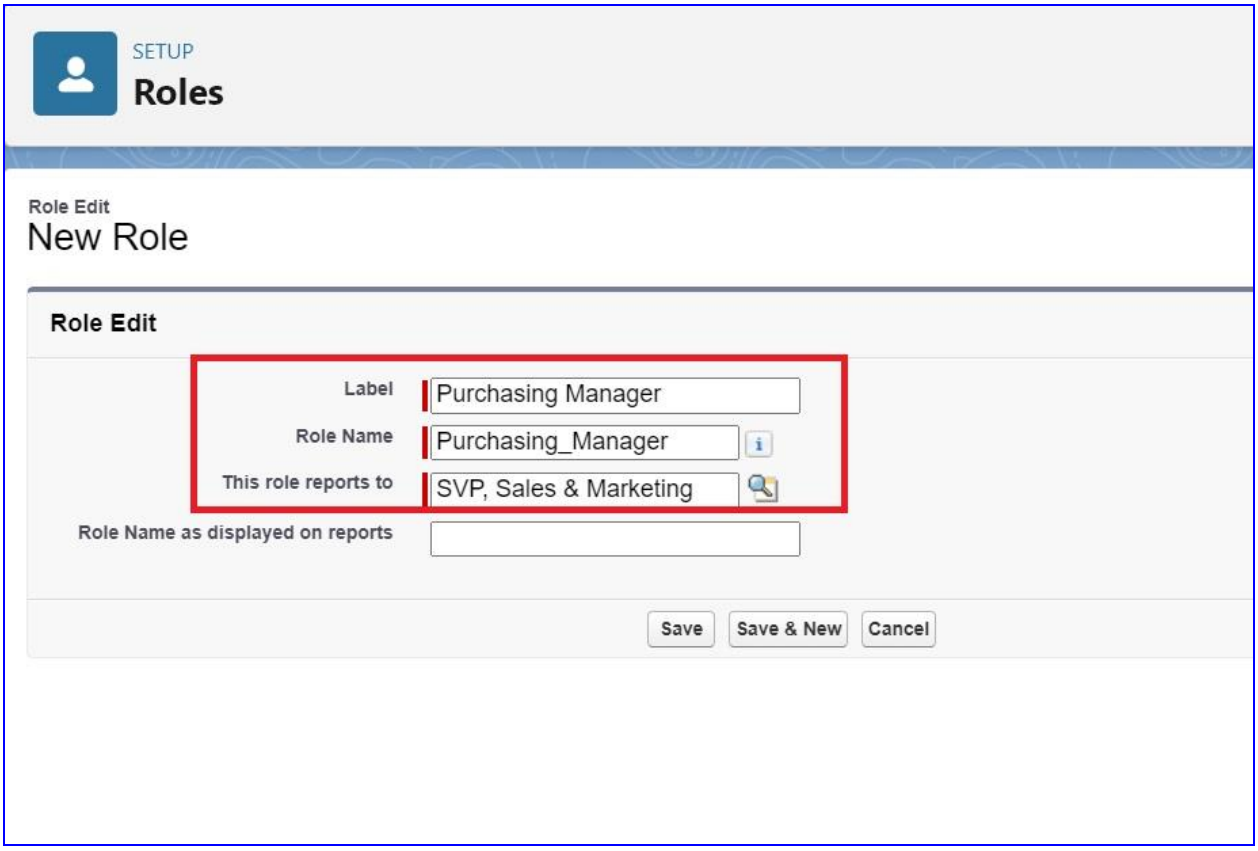
Roles Creation

Activity 1 : Create a Purchasing Manager Role.

1. Go to quick find >> Search for Roles >> click on Set Up Roles.

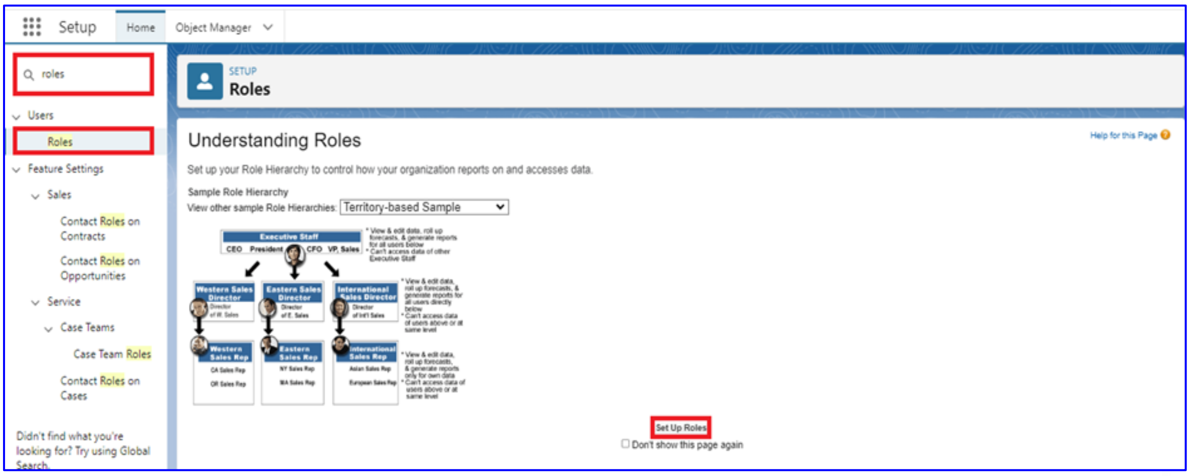


2. Click on Expand All and click on add role under SVP, Sales & Marketing role.
3. Give Label as "**Purchasing Manager**" and Role name gets auto populated. Then click on Save.

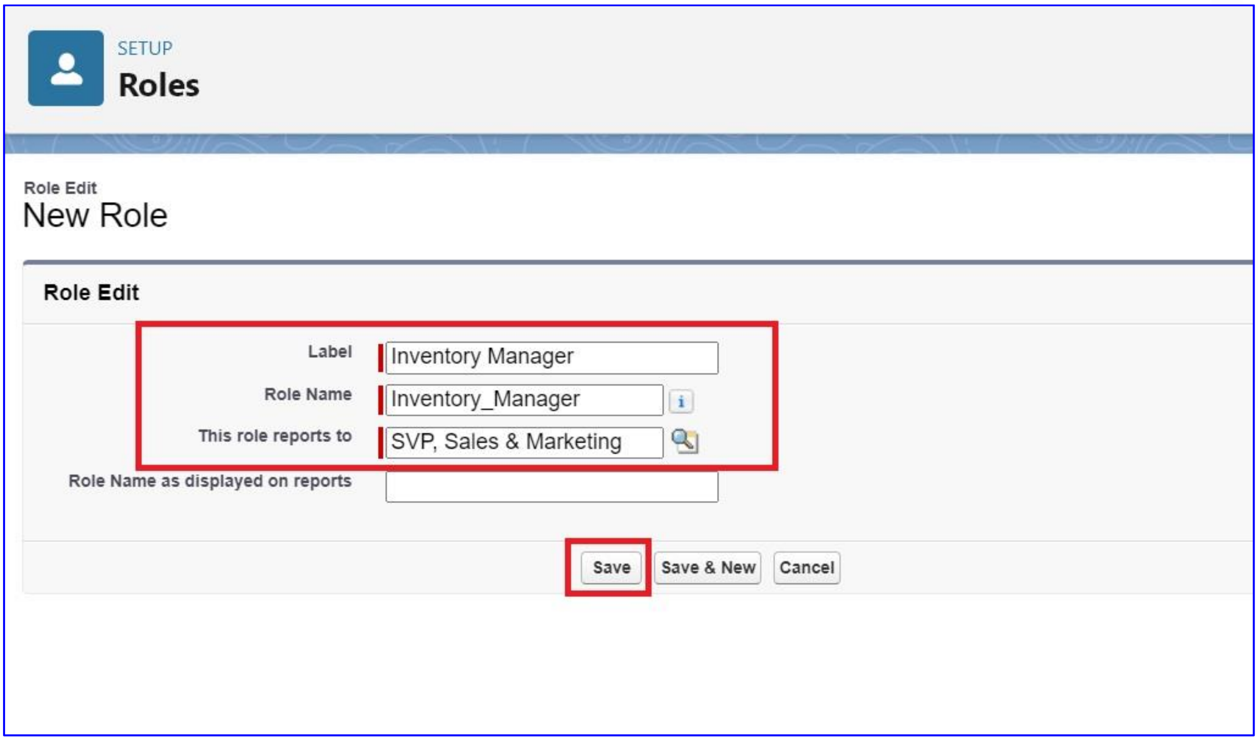


Activity 2 : Create a Purchasing Manager Role.

1. Go to quick find >> Search for Roles >> click on Set Up Roles.



2. Click on Expand All and click on add role under SVP, Sales & Marketing role.
3. Give Label as "**Inventory Manager**" and the Role name gets auto populated. Then click on Save.

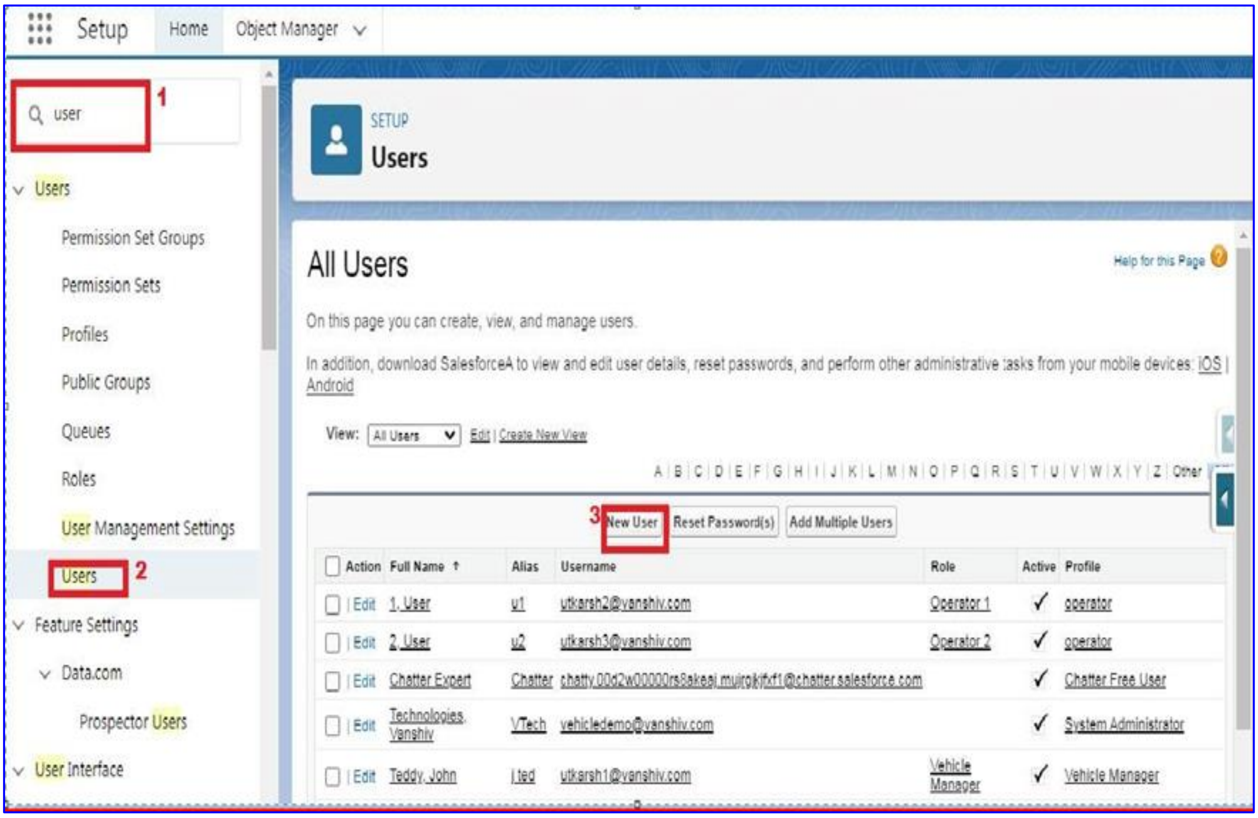


MEDICAL INVENTORY MANAGEMENT
Milestone-11

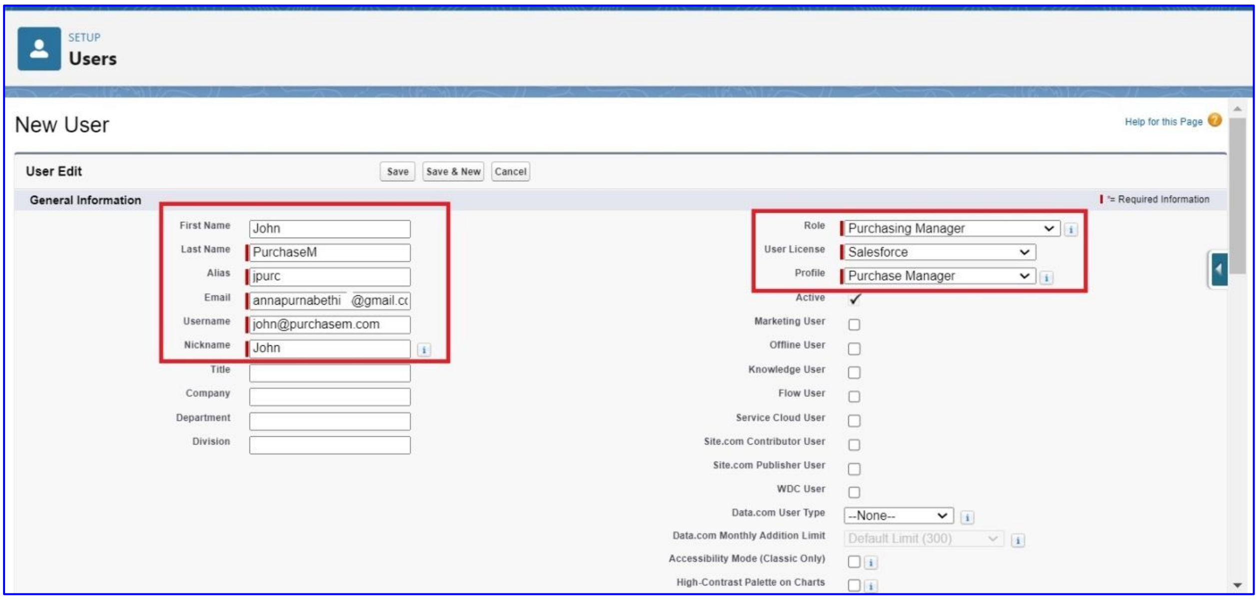
Users Creation

Activity 1 : Create a Purchasing Manager User.

1. Go to setup >> type users in quick find box >> Select Users >> click on New User.

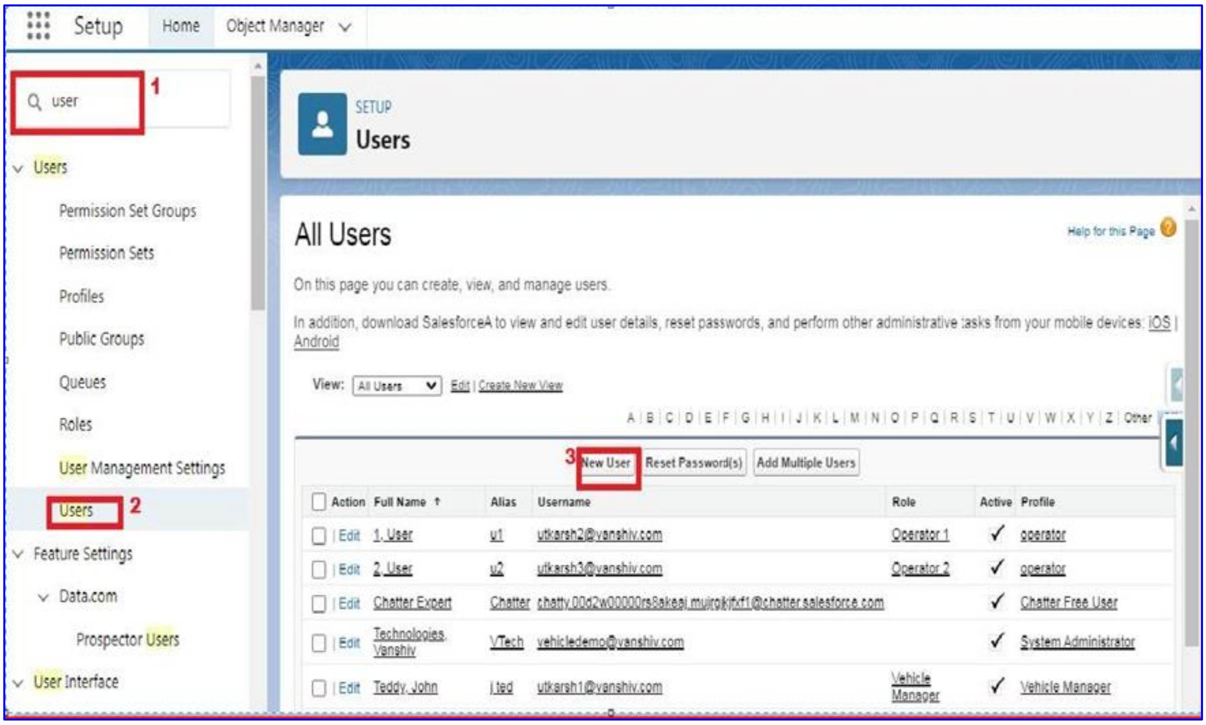


2. Enter the First Name- John, Last Name- PuchaseM and (Your) email address and a unique username in the form of an email address. By default, the username is the same as the email address.
3. Select Role as Purchasing Manager.
4. Select a User License as salesforce.
5. NOTE- As Salesforce license can only be used by 2 Users at a time in Dev Org, So If you don't find a salesforce license then deactivate a user who has a salesforce license or change the license type from Salesforce to any other.
6. Select a profile as Purchase Manager.
7. Check Generate new password and notify the user immediately to have the user's login name and a temporary password emailed to your email.
8. Click on Save.



Activity 2 : Create an Inventory Manager User.

1. Go to setup >> type users in quick find box >> Select Users >> click on New User.



2. Enter the First Name- Ram, Last Name- Krishna and (Your) email address and a unique username in the form of an email address. By default, the username is the same as the email address.
3. Select Role as Inventory Manager.
4. Select a User License as salesforce.

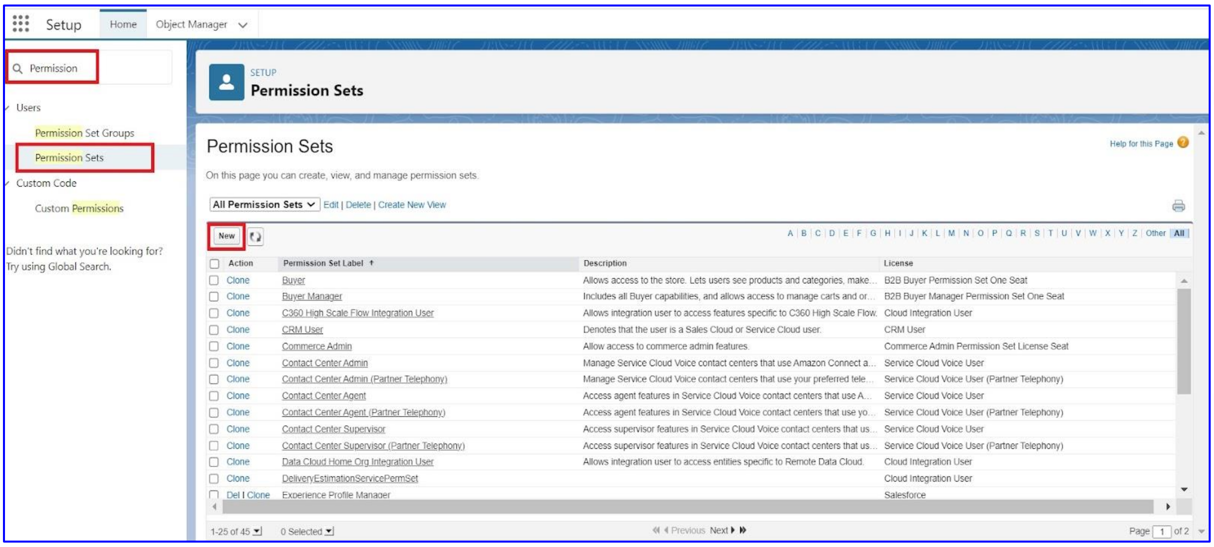
5. NOTE- As Salesforce license can only be used by 2 Users at a time in Dev Org, So If you don't find a salesforce license then deactivate a user who has a salesforce license or change the license type from Salesforce to any other.
6. Select a profile as Inventory Manager.
7. Check Generate new password and notify the user immediately to have the user's login name and a temporary password emailed to your email.
8. Click on Save.

MEDICAL INVENTORY MANAGEMENT
Milestone-12

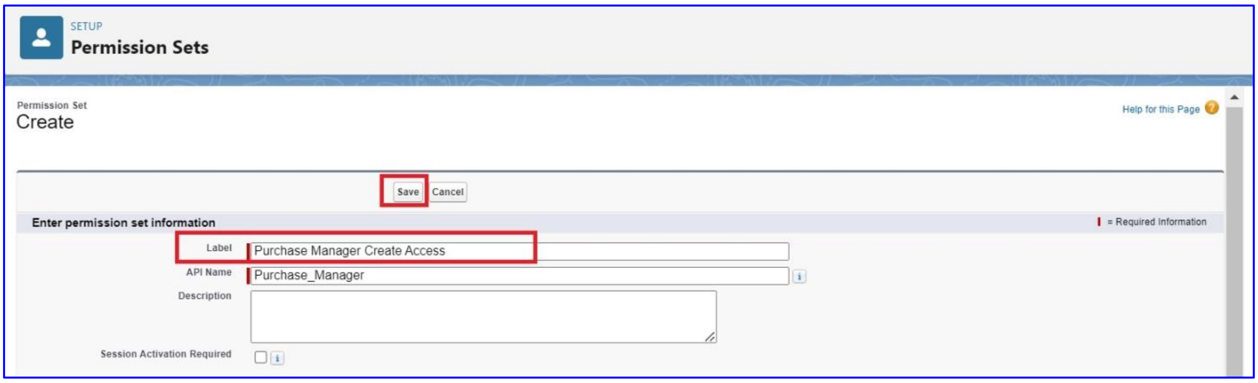
Permission Sets Creation

Activity 1 : Create a Permission Set.

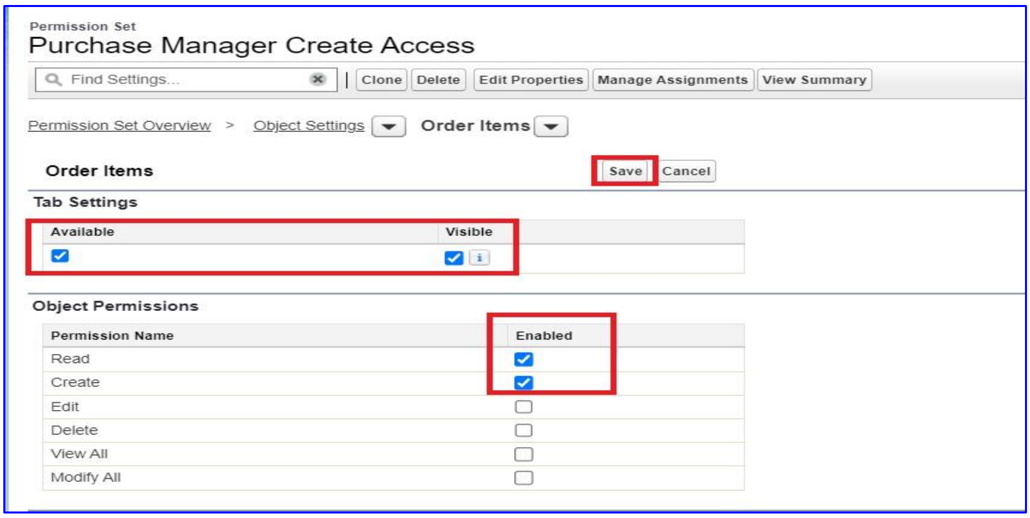
1. Go to setup >> type Permission in quick find box >> Select Permission Set >> click on New.



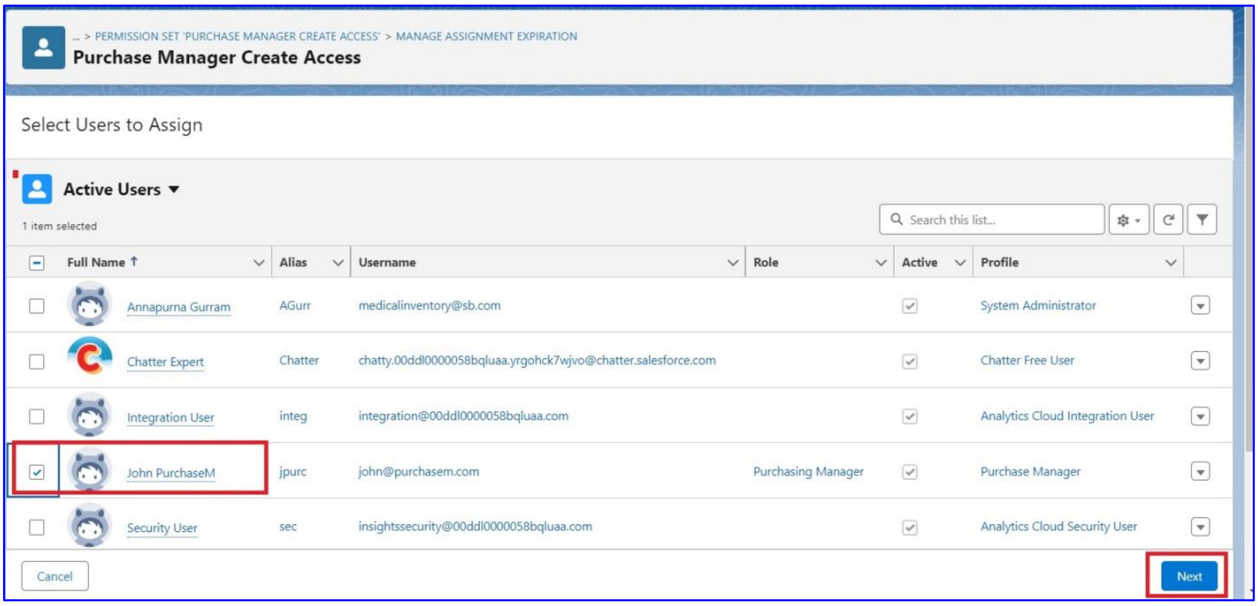
2. Enter Label as **Purchase Manager Create Access** >> Click on Save.



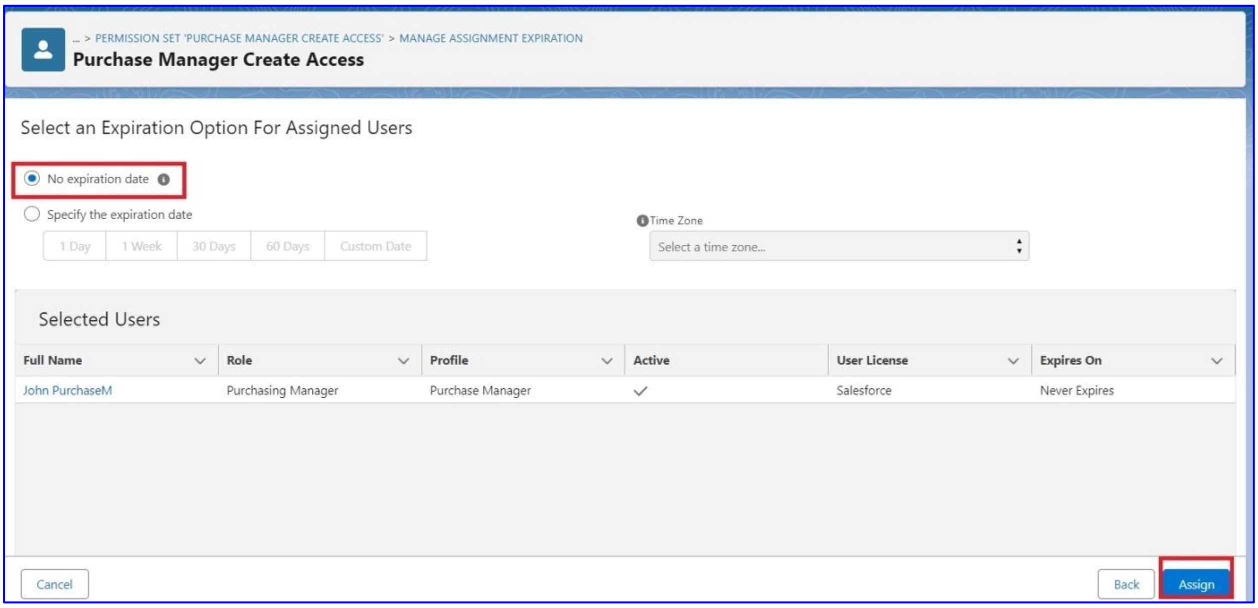
3. From Object Settings >> Select Order Item >> Enable for both Tab Available and Visible >>
4. Enable Read and Create in Object Permissions >> Click on Save.



5. Navigate to the Permission Set detail page >> Click Manage Assignments >> Click Add Assignments >> Select the user John PurchaseM to assign the permission set to and click Next.



6. Select No Expiration date >> Click on Assign.



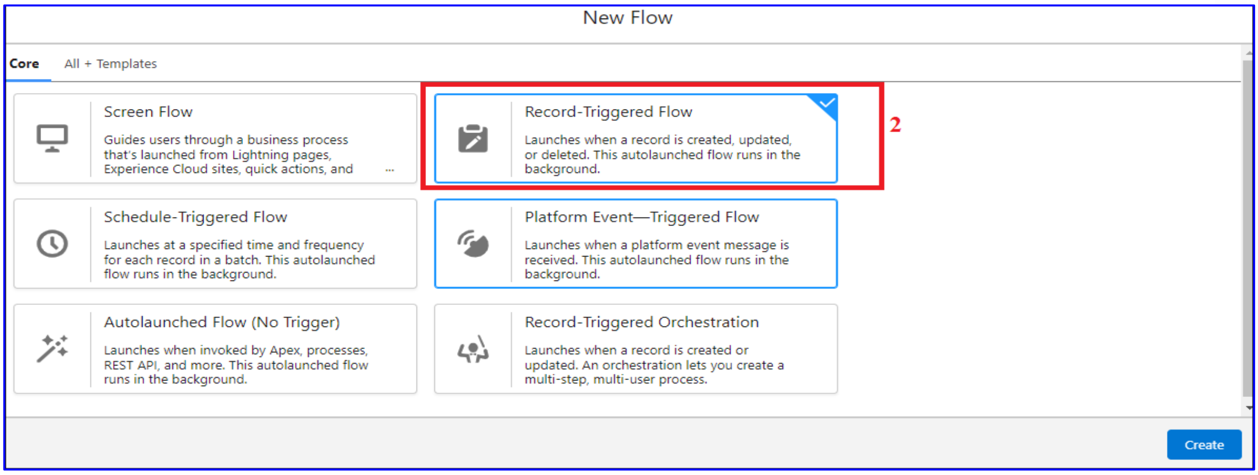
MEDICAL INVENTORY MANAGEMENT
Milestone-13

Flows Creation

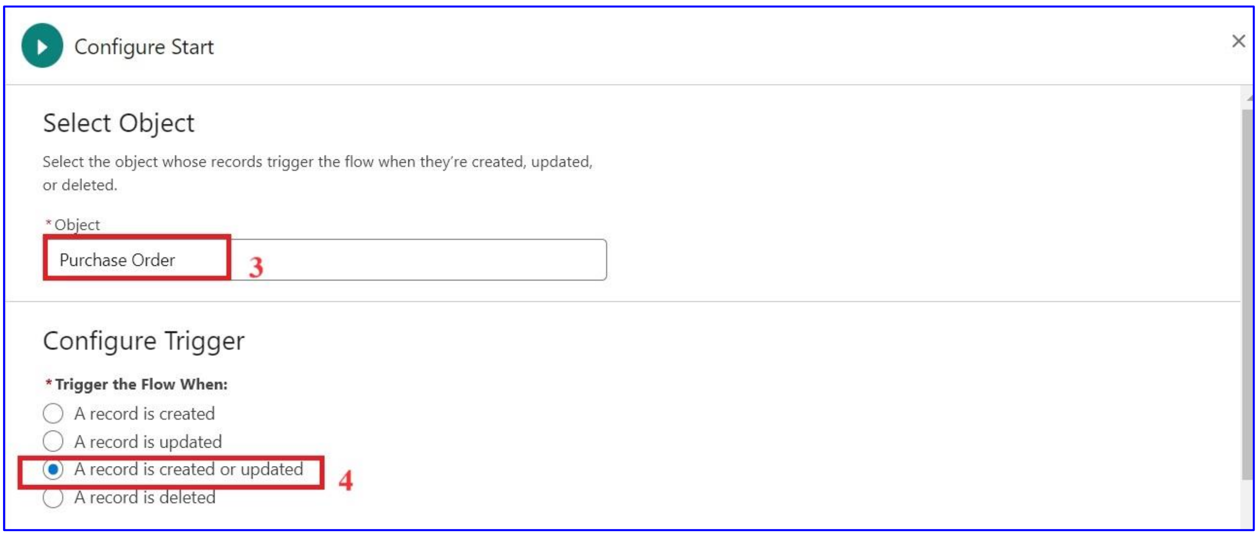
Activity 1 : Create Flow to update the Actual Delivery Date.

1. Go to setup >> type Flow in quick find box >> Click on the Flow and Select the New Flow >> Start From Scratch .

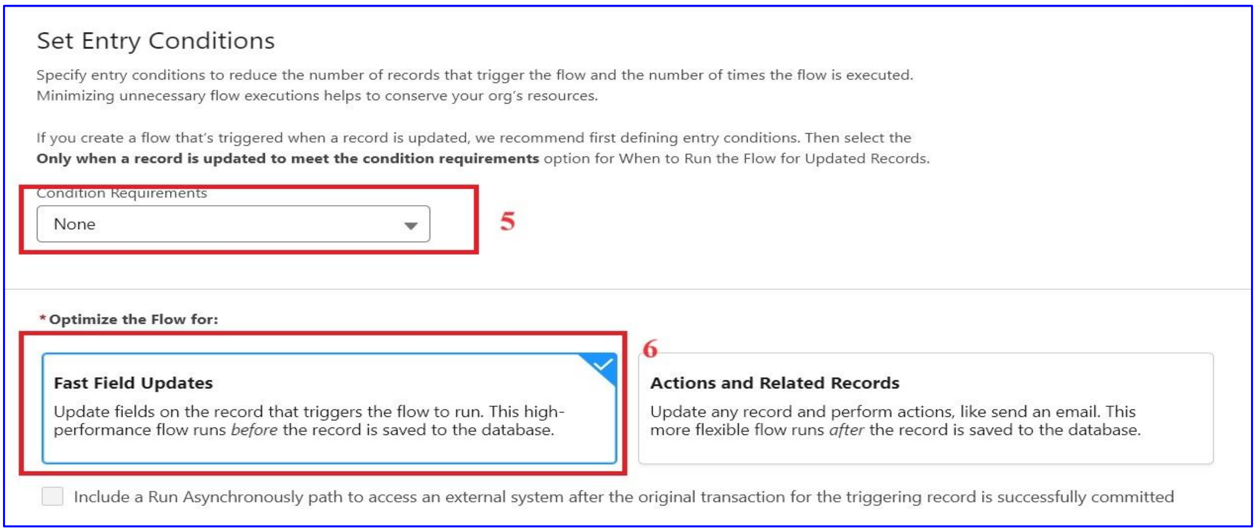
2. Select the record Triggered flow.Click on create.



3. Under Object select "**Purchase Order**"
4. Select A record is created or updated



5. Set Entry Conditions : None
6. Select Fast Field Updates and click on Done



7. Under the record trigger flow click on the "+" icon and select Get Records.
8. Enter Label as " **Get Purchase Record** ".
9. For Object select Purchase Order.
10. For Condition Requirements , select All Conditions are Met(AND)
11. For the first condition select as follows:

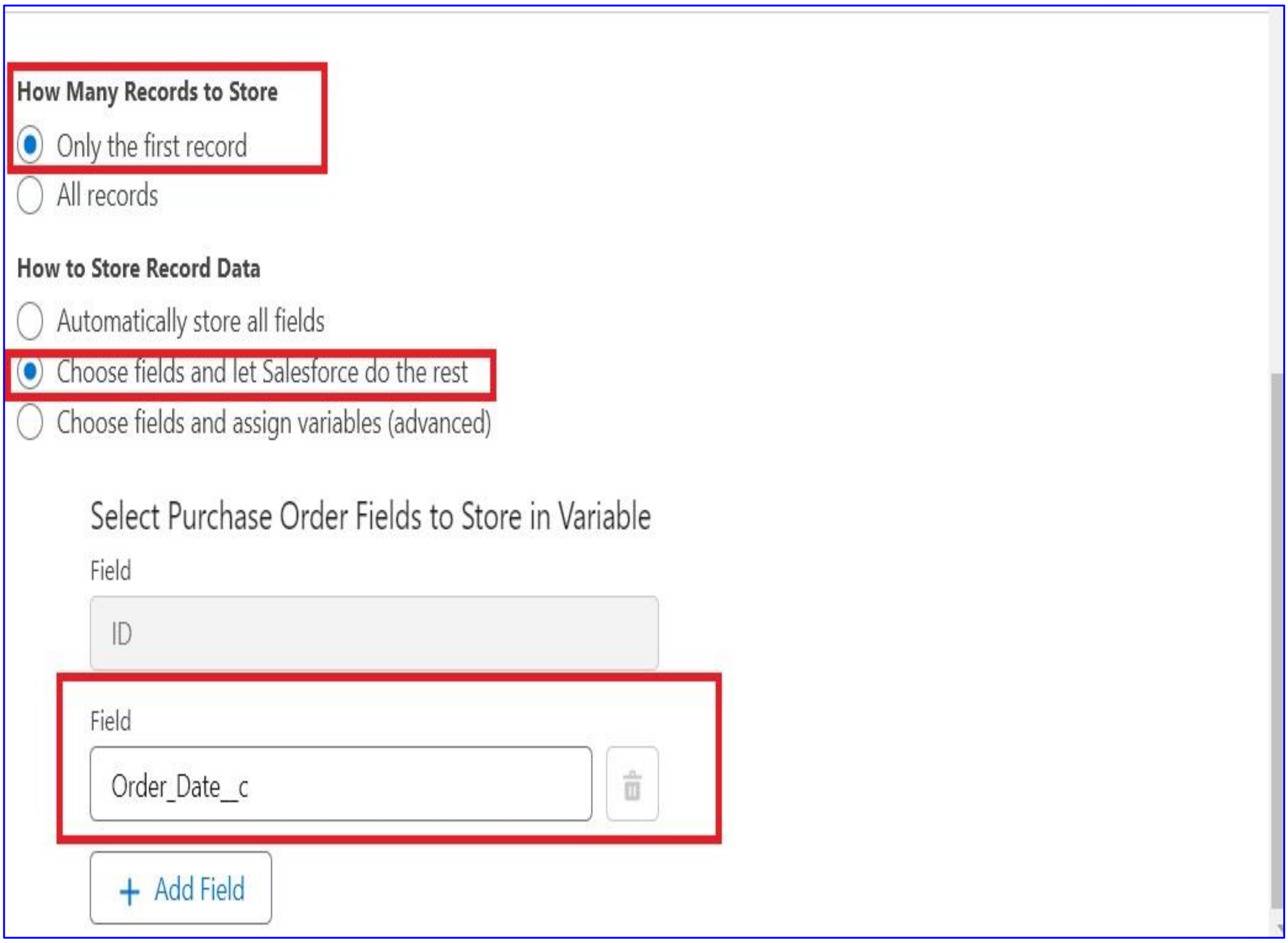
    Field: Id

    Operator: Equals

    Value: {!$Record.Id}

12. For How many Records to store Select Only the First Record.

13. For How to Store Record Data select Choose fields and let Salesforce do the rest. Select Field: Order_Date__c. Click on Done.



14. In the Flow Builder, click on the Manager tab on the left-hand side >> Click on New Resource >> In the Resource Type dropdown, select Variable.
15. Enter API name as ActualDeliveryDate >> Select Data type as Date >> Click on Done.
16. From the Toolbox drag and drop Assignment element.
17. Enter the label as "Assignment".
18. Set Variable Values:

a) Variable : {!ActualDeliveryDate}

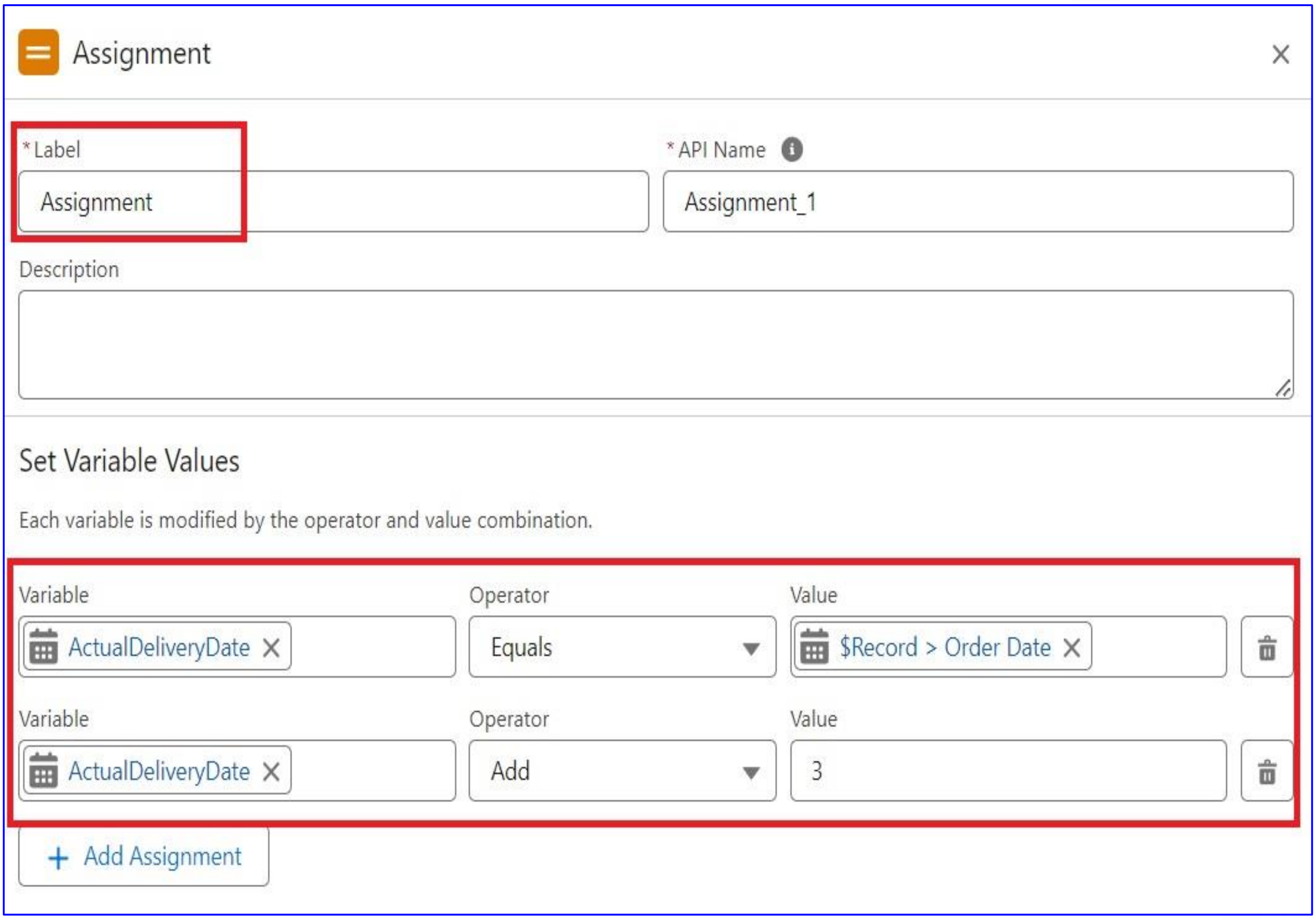
Operator : Equals

Value : {!$Record.Order_Date__c}

b) Variable : {!ActualDeliveryDate}

Operator : Add

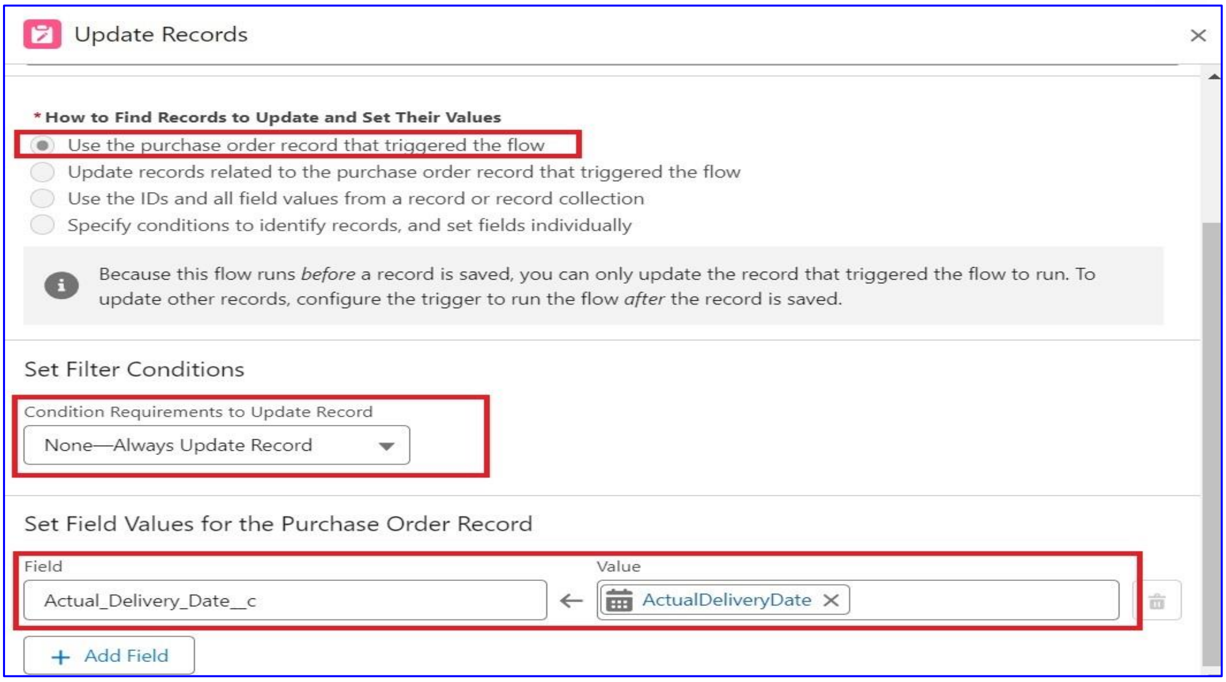
Value : 3



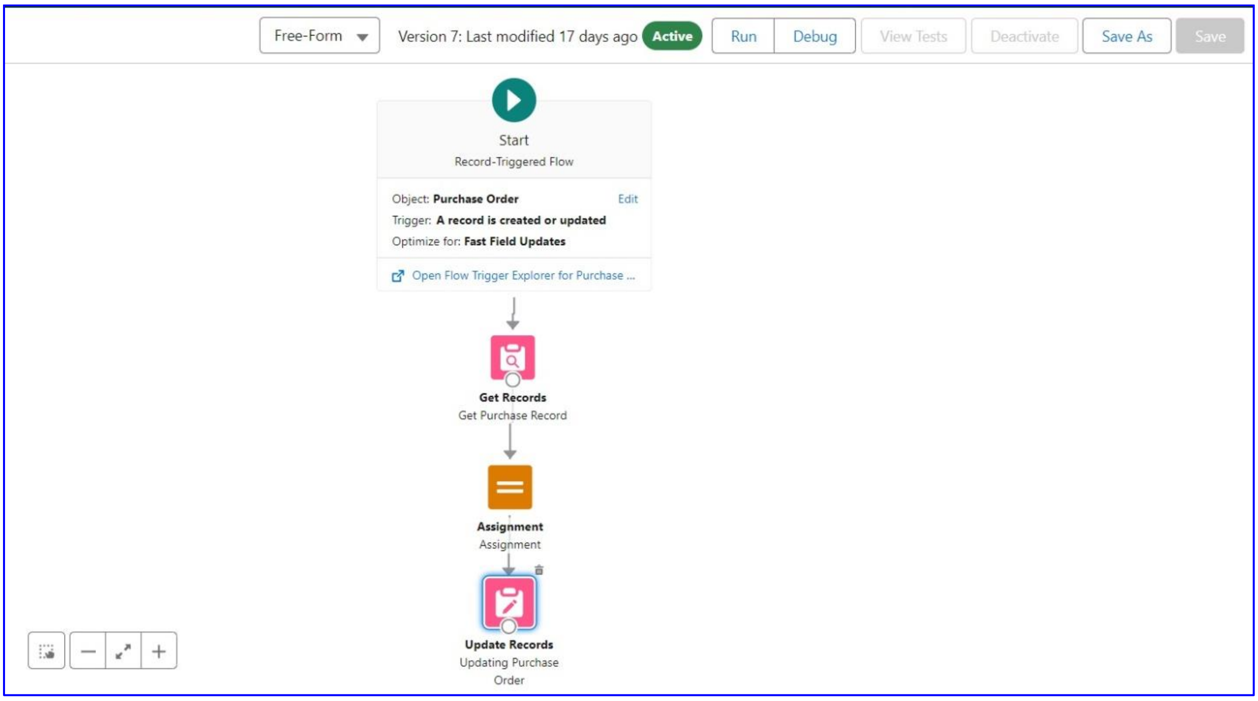
19. Click Done
20. From the Toolbox drag and drop Update Records element and connect to the Assignment element.
21. Enter the label as “Updating Purchasing Order”.
22. How to Find Records to Update and Set Their Values : Use the Purchase Order record that triggered the flow
23. Set Filter Conditions : None -Always Update Record
24. Set Field Values for the Trip Record as

    Field : Actual_Delivery_Date__c

    Value : {!ActualDeliveryDate}



25. Click Done
26. Save the flow as "Actual Delivery Date Updating".
27. Activate the flow.



Activity 1 : Create a Trigger to Calculate total amount on Order Item.

Step 1 : Login to Salesforce:

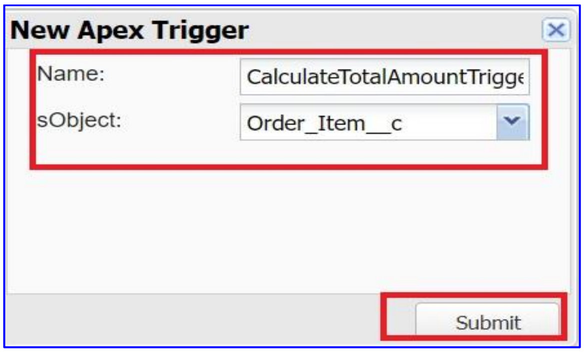
Log in to your Salesforce account with administrative privileges.

Step 2:

i. Navigate to Setup: Once logged in, click on the gear icon ?? (Setup) located at the top-right corner of the page. This will open the Setup menu.
ii. Click on Developer Console: Click on the "Developer Console" option from the Setup menu. This will open the Developer Console in a new browser tab or window.

Step 3:

i. In the Developer Console window, go to the top menu and click on "File".
ii. Select New: From the dropdown menu under "File", select "New".
iii. Choose Apex Trigger: This will open a new Apex Trigger editor tab.



Create an Apex Trigger:

```
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);
}
```

Step 4:

i. In the Developer Console window, go to the top menu and click on "File".
ii. Select New: From the dropdown menu under "File", select "New".
iii. Choose Apex Class: Name it as CalculateTotalAmountHandler

```
 public class CalculateTotalAmountHandler {
  // Method to calculate the total amount for Purchase Orders based on related Order Items
    public static void calculateTotal(List<Order_Item__c> newItems, List<Order_Item__c>
oldItems, Boolean isInsert, Boolean isUpdate, Boolean isDelete, Boolean isUndelete) {
       // Collect Purchase Order IDs affected by changes in Order_Item__c records
        Set<Id> parentIds = new Set<Id>();
        // For insert, update, and undelete scenarios
        if (isInsert || isUpdate || isUndelete) {
            for (Order_Item__c ordItem : newItems) {
                parentIds.add(ordItem.Purchase_Order_Id__c);
            }
        }
                // For update and delete scenarios
        if (isUpdate || isDelete) {
            for (Order_Item__c ordItem : oldItems) {
                parentIds.add(ordItem.Purchase_Order_Id__c);
            }
        }
        // Calculate the total amounts for affected Purchase Orders
        Map<Id, Decimal> purchaseToUpdateMap = new Map<Id, Decimal>();
        if (!parentIds.isEmpty()) {
            // Perform an aggregate query to sum the Amount__c for each Purchase Order
            List<AggregateResult> aggrList = [
                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
            ];
                     // Map the result to Purchase Order IDs
            for (AggregateResult aggr : aggrList) {
                Id purchaseOrderId = (Id)aggr.get('Purchase_Order_Id__c');
                Decimal totalAmount = (Decimal)aggr.get('totalAmount');
                purchaseToUpdateMap.put(purchaseOrderId, totalAmount);
            }
            // Prepare Purchase Order records for update
            List<Purchase_Order__c> purchaseToUpdate = new List<Purchase_Order__c>();
            for (Id purchaseOrderId : purchaseToUpdateMap.keySet()) {
                Purchase_Order__c purchaseOrder = new Purchase_Order__c(Id = purchaseOrderId,
Total_Order_cost__c = purchaseToUpdateMap.get(purchaseOrderId));
```

```
                purchaseToUpdate.add(purchaseOrder);
            }
            // Update Purchase Orders if there are any changes
            if (!purchaseToUpdate.isEmpty()) {
                update purchaseToUpdate;
            }
        }
    }
}
```

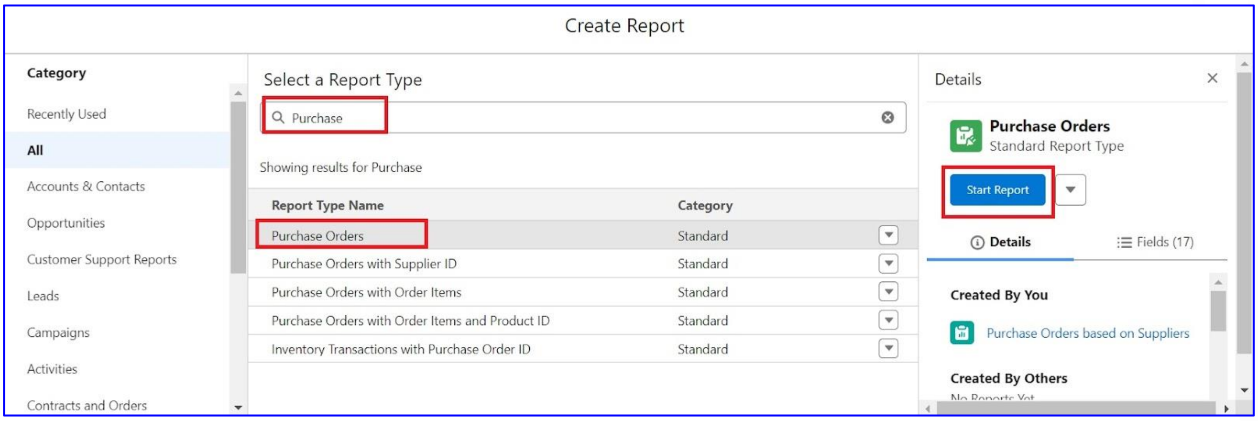
Save it.

MEDICAL INVENTORY MANAGEMENT
Milestone-15

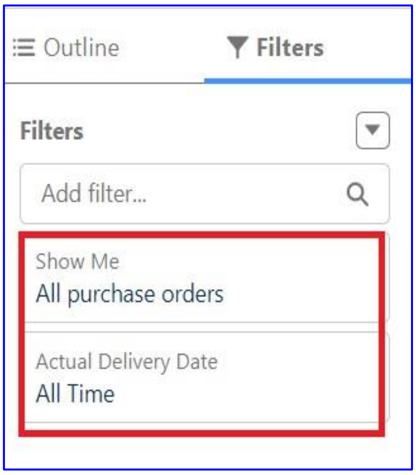
Reports Creation

Activity 1: Create a Purchase Orders based on Suppliers (Summary) Report

1. Click App Launcher
2. Select Medical Inventory Management App
3. Click on Reports tab
4. Click on New Report.
5. Click the report type as **Purchase Orders** Click Start report.



6. Click on Filters and select as follows and click on Apply

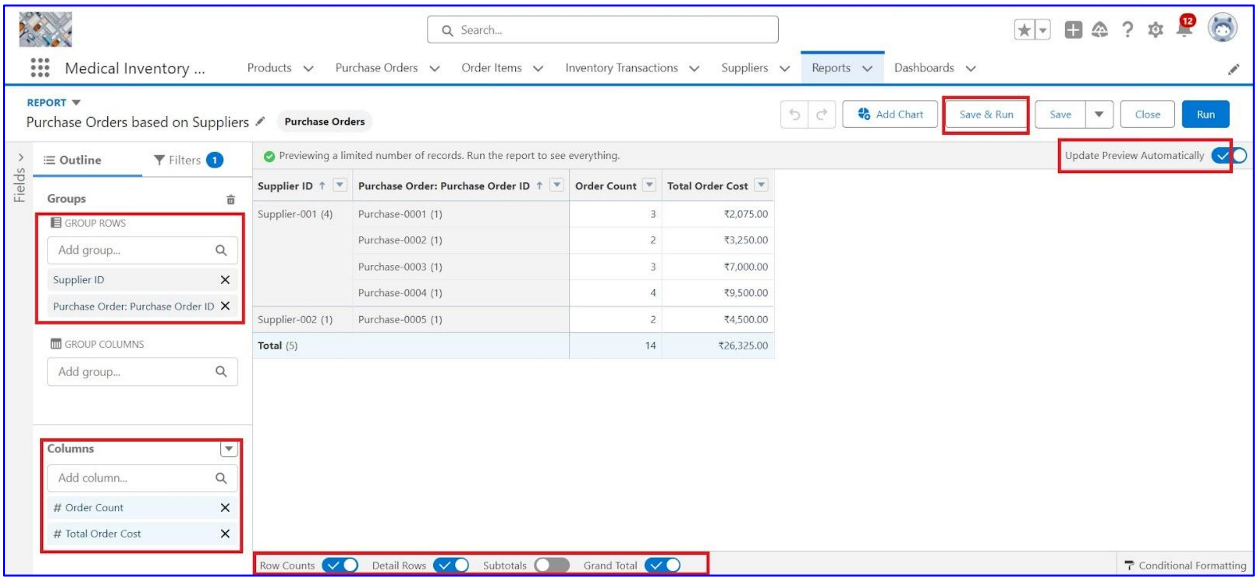


7. Customize your report, in group rows select – Supplier ID, Purchase Order: Purchase Order ID, for columns Order Count, Total Order Cost (In this way we are making a Summary Report).
8. Click save and run
9. Give report name – Purchase Orders based on Suppliers.
10. Click Save

NOTE: In this report you can see your all record of the object you selected for reporting

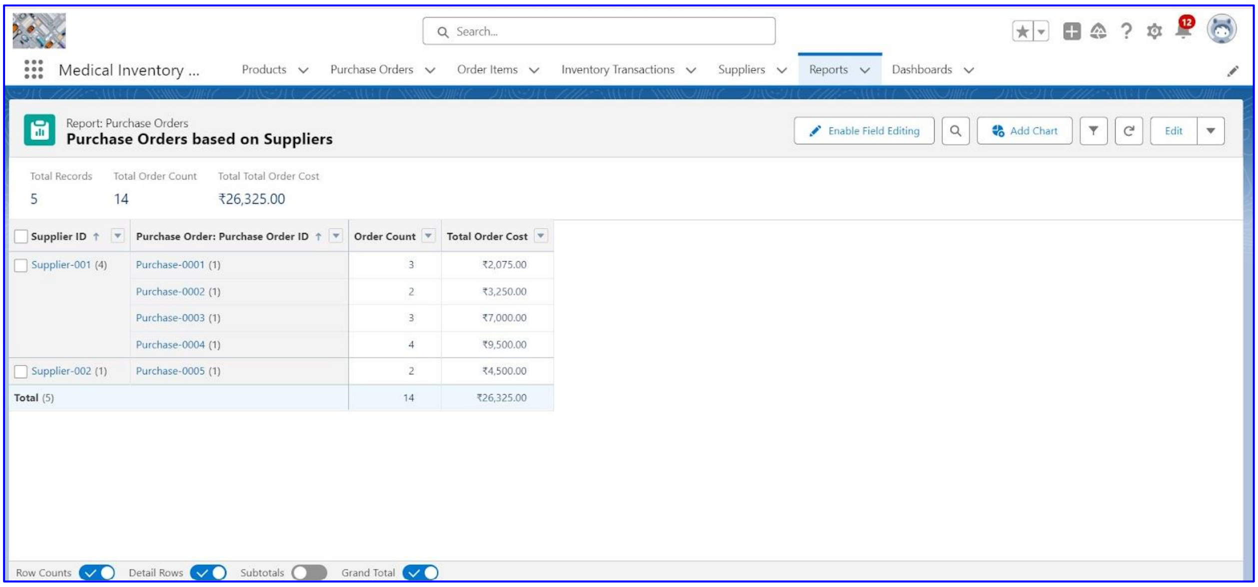
MEDICAL INVENTORY MANAGEMENT

(What you selects in "Select a report type option")



View Report

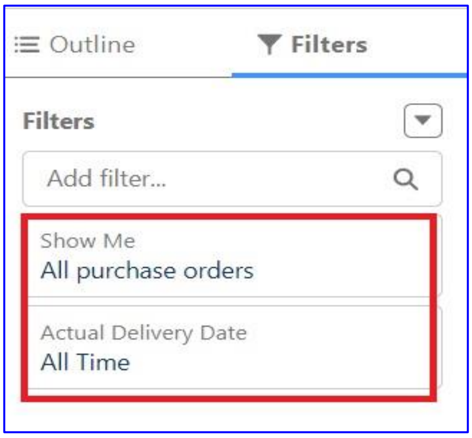
1. Click on App Launcher on the left side of the screen.
2. Search Medical Inventory Management App & click on it.
3. Click on Reports Tab.
4. Click on Purchase Orders based on Suppliers and see records.



Activity 2: Create a Complete Purchase Details Report

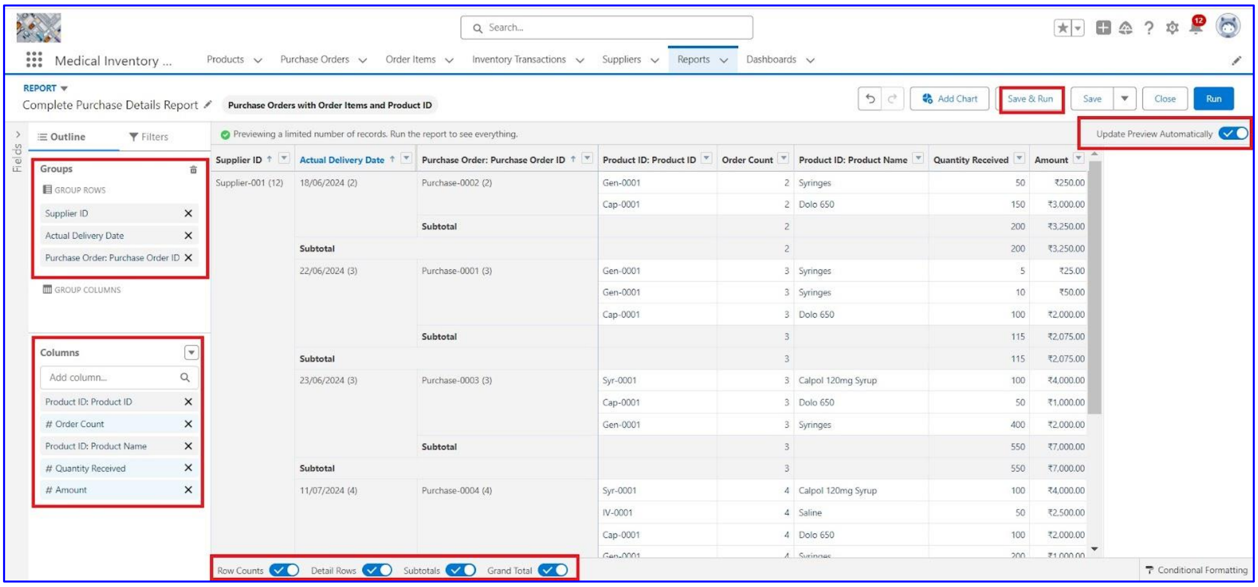
1. Click App Launcher
2. Select Medical Inventory Management App
3. Click on Reports tab

4. Click on New Report.
5. Click the report type as Purchase Orders with Order Items and Product ID >> Click Start report.
6. Click on Filters and select as follows and click on Apply



7. Customize your 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).

8. Click save and run
9. Give report name – Complete Purchase Details Report
10. Click Save

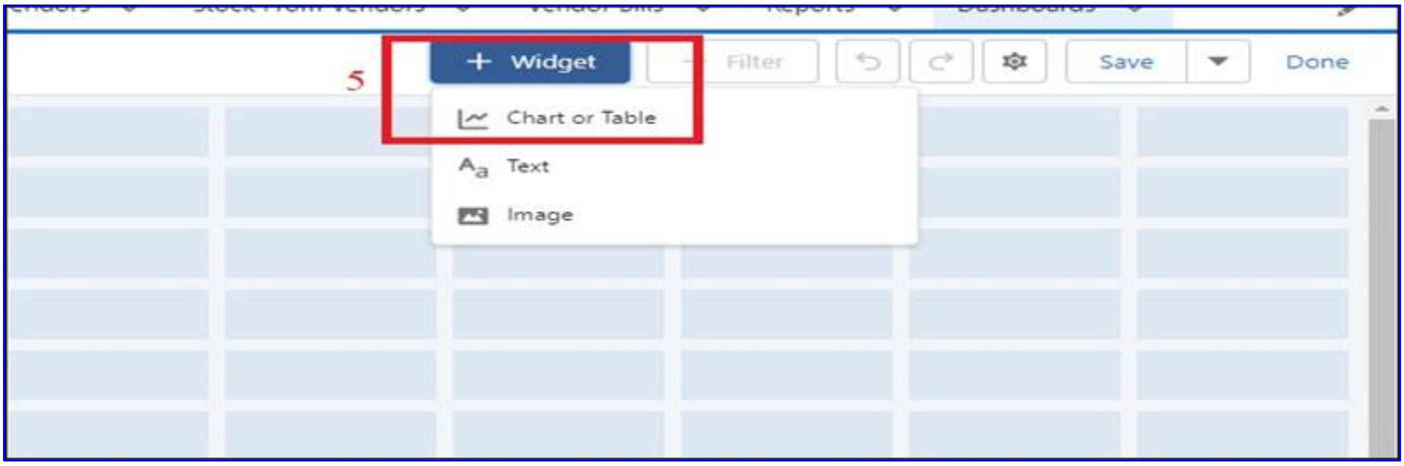


MEDICAL INVENTORY MANAGEMENT
Milestone-16

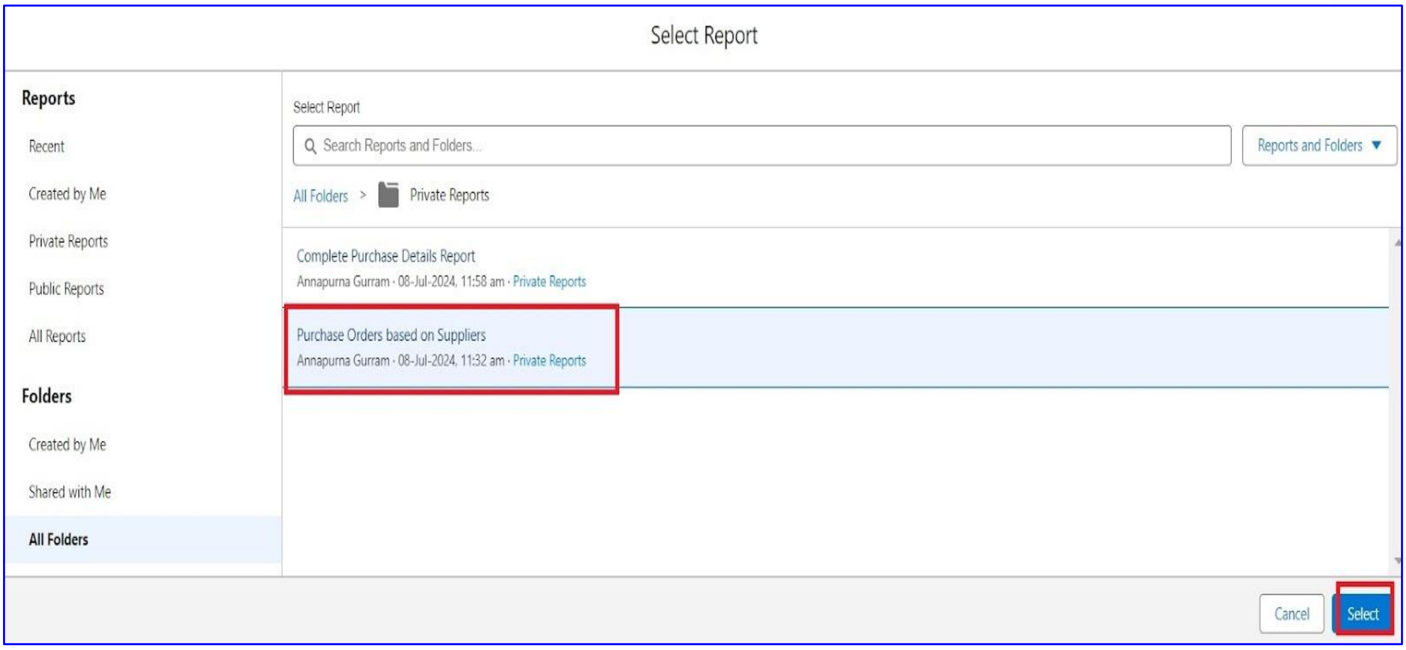
Dashboards Creation

Activity 1: - Create Dashboard

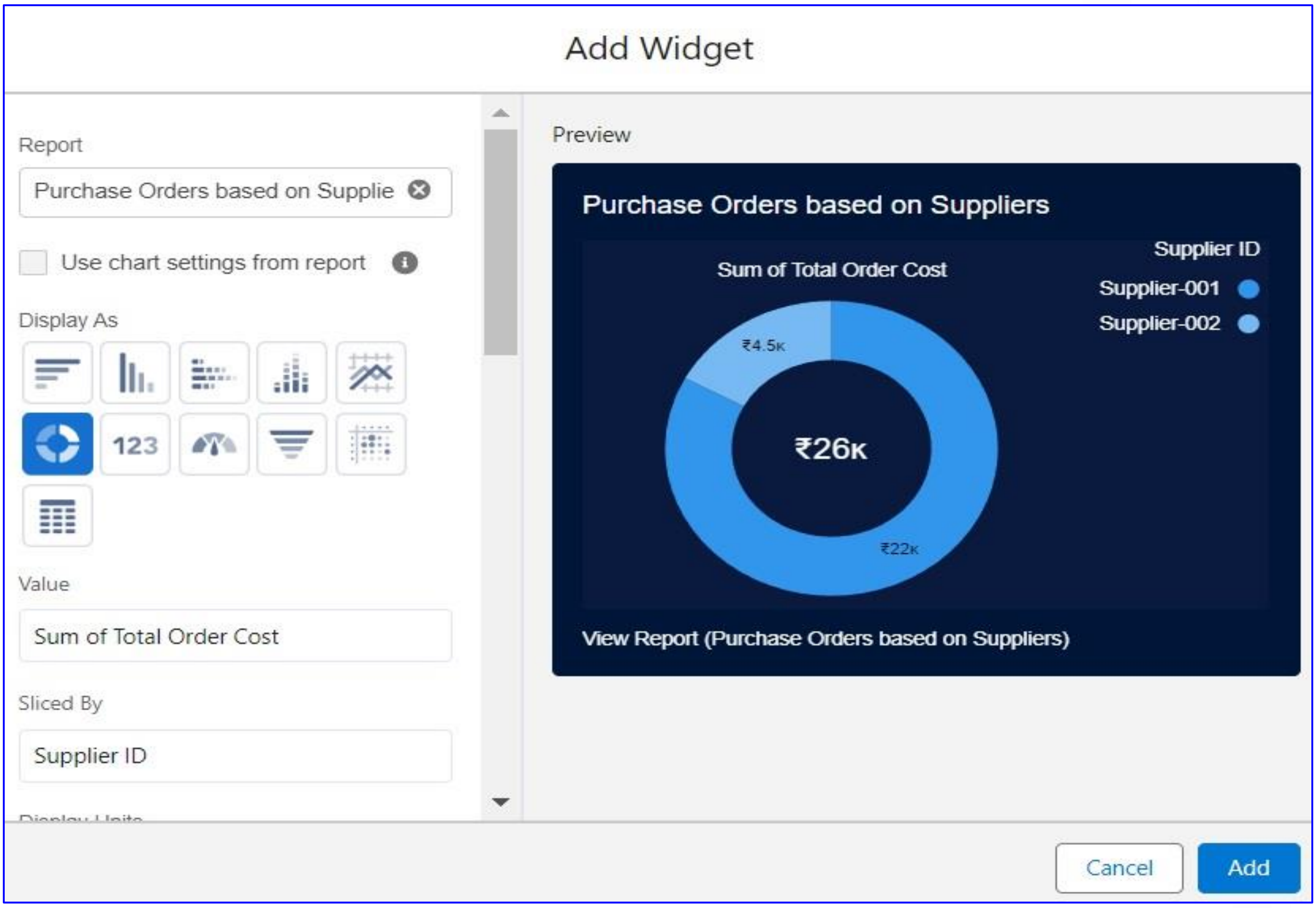
1. Click on the Dashboards tab from the Medical Inventory Management application.
2. Click on the new dashboard.
3. Give name - **Medical Inventory DashBoard**
4. Click create
5. Click on +widget

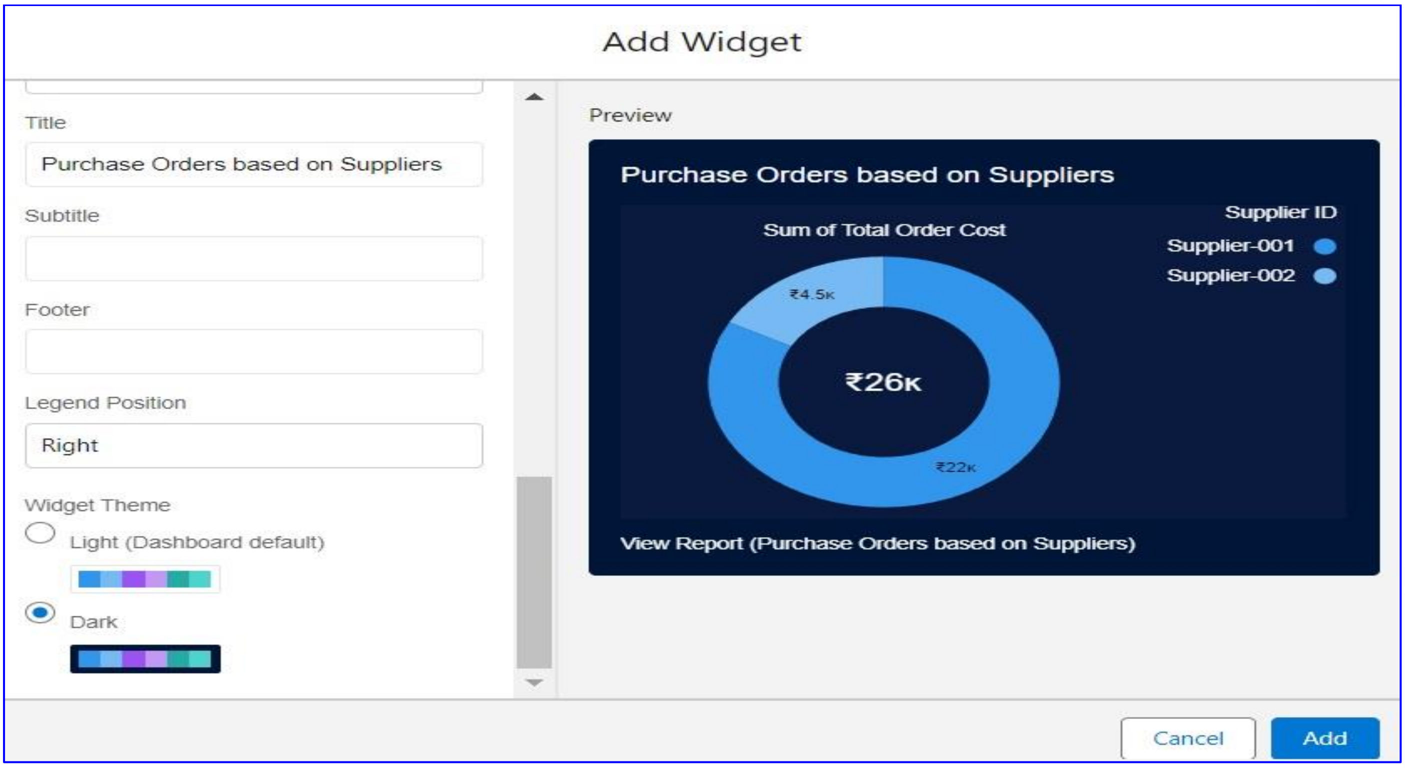


6. Select the Purchase Orders based on Suppliers Report



7. For the data visualization select any of the charts, tables etc. as per your choice/requirement

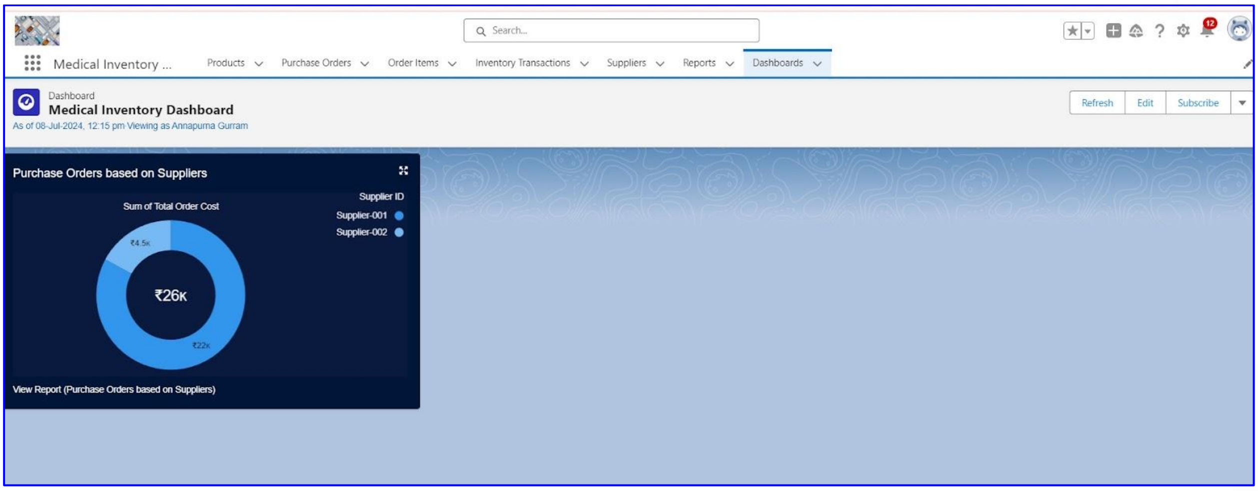




8. Click add.
9. Click save.

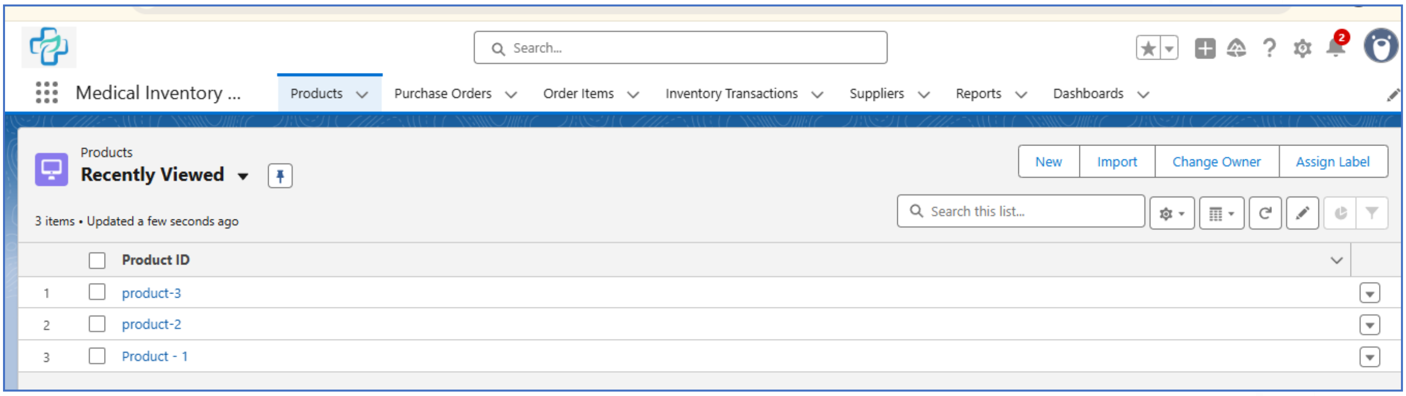
Activity 2: View Dashboard

1. Click on App Launcher on the left side of the screen.
2. Search Medical Inventory Management & click on it.
3. Click on Dashboard Tab.
4. Click on **Medical Inventory DashBoard** see graph view of records

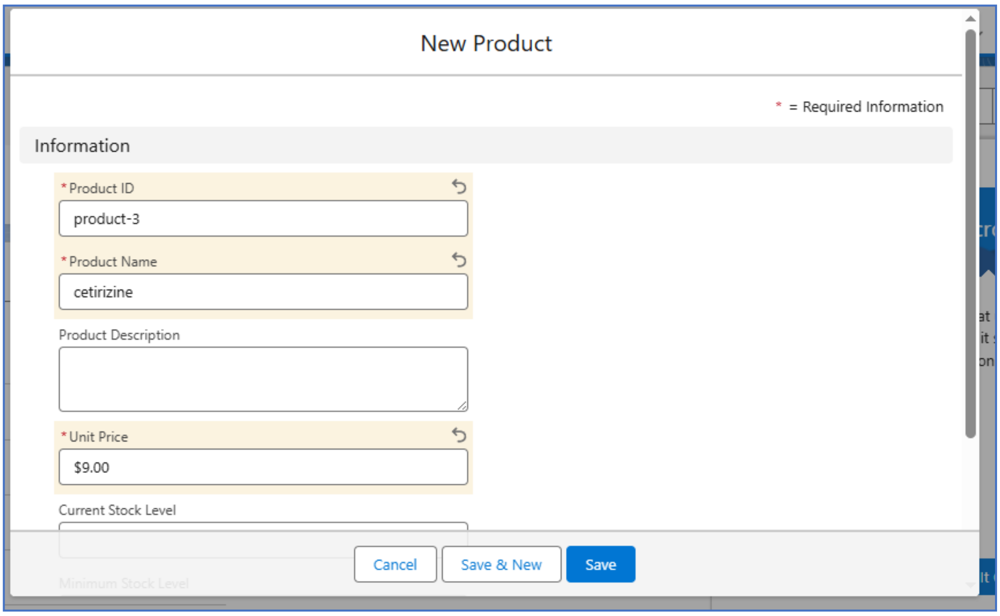


MEDICAL INVENTORY MANAGEMENT

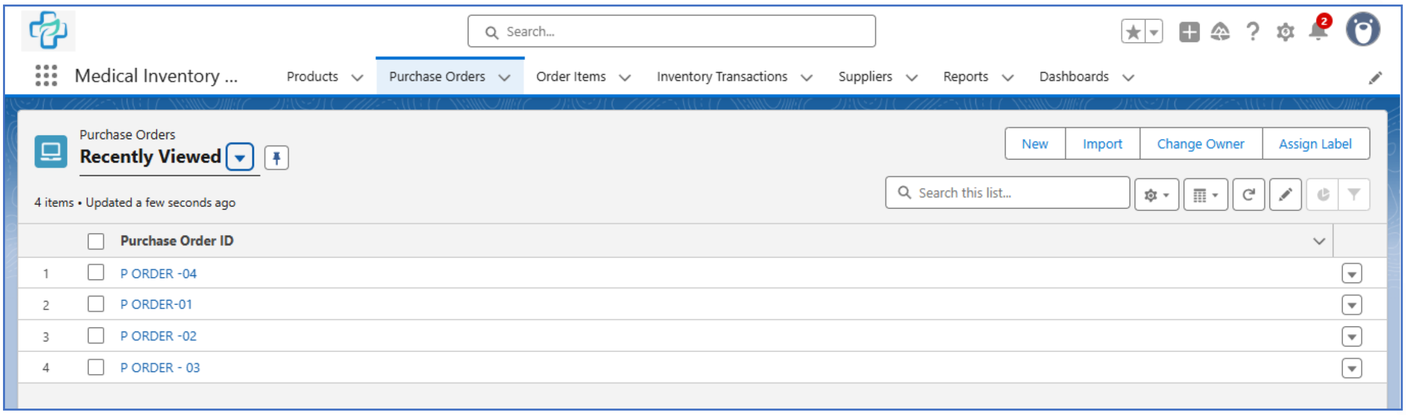
OUTPUTS:



PRODUCTS TAB

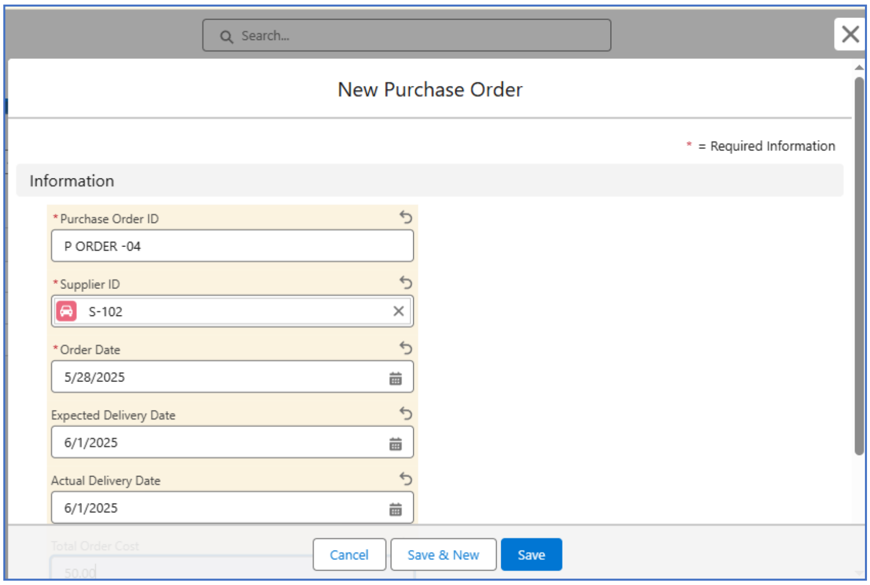


NEW PRODUCT DETAILS

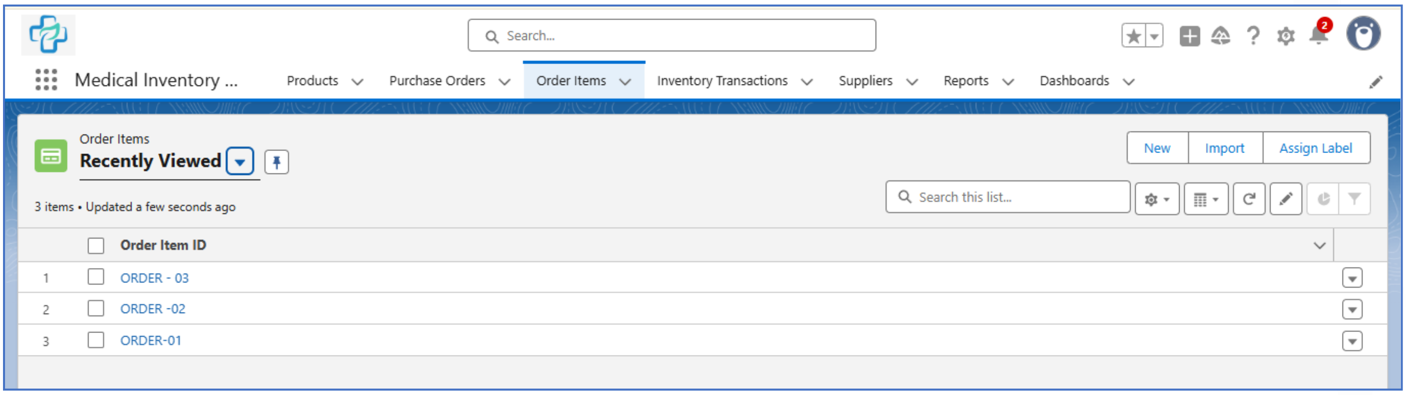


PURCHASE ORDERS TAB

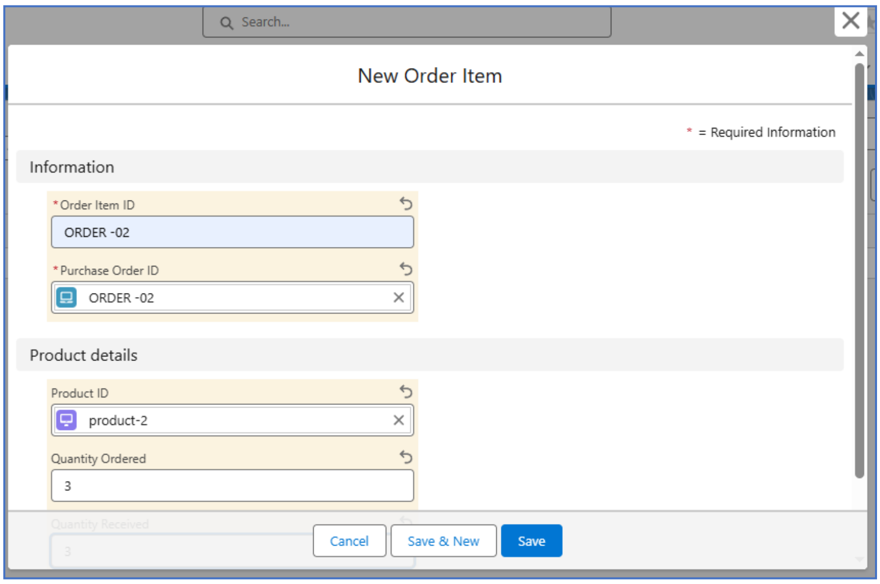
MEDICAL INVENTORY MANAGEMENT



NEW PURCHASE ORDER DETAILS

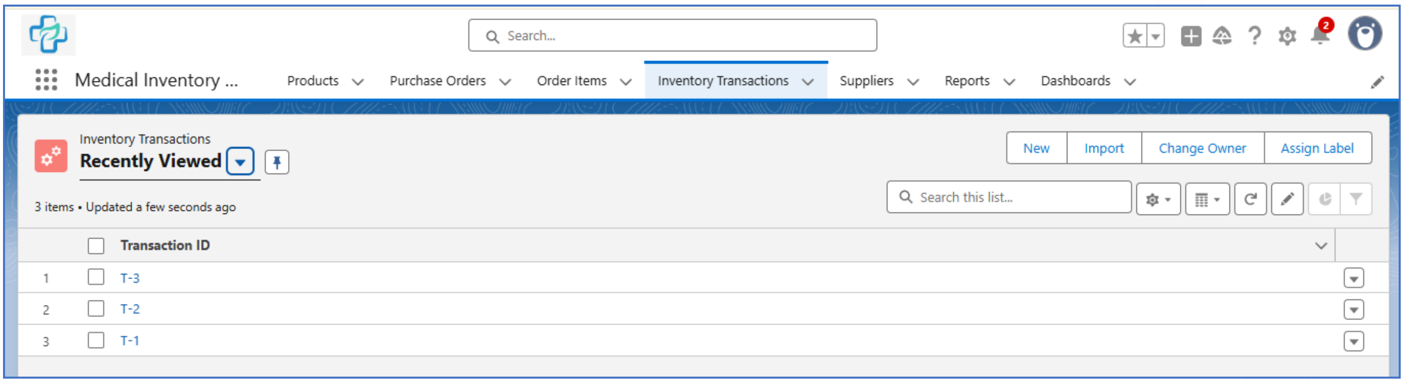


ORDER ITEMS TAB

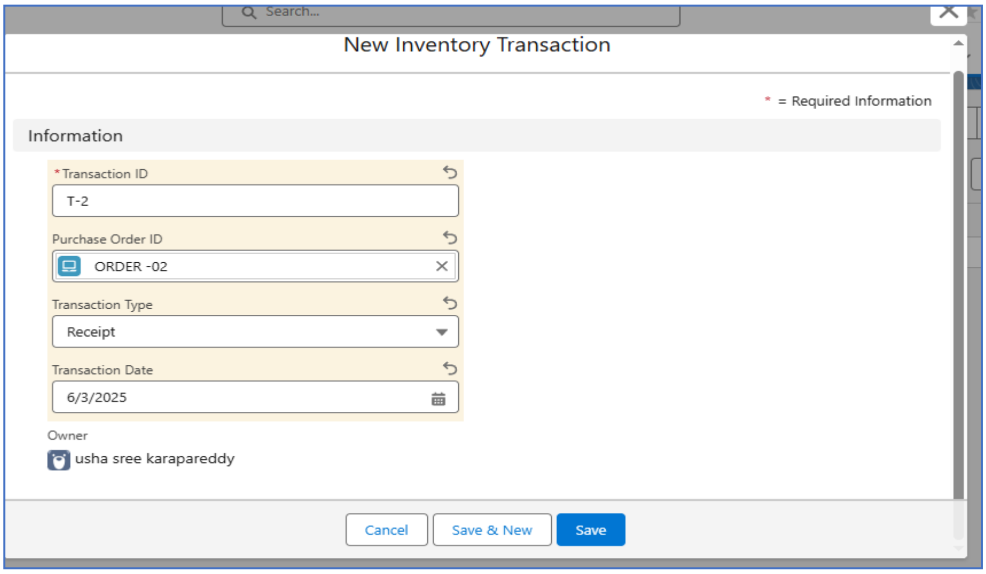


NEW ORDER ITEM DETAILS

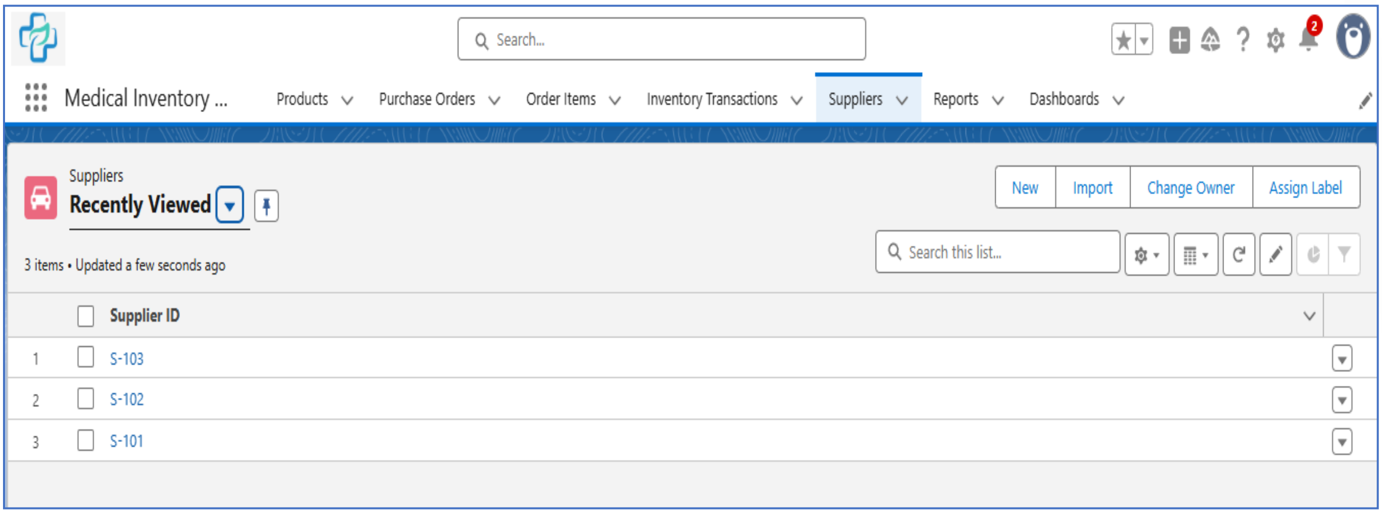
MEDICAL INVENTORY MANAGEMENT



INVENTORY TRANSACTIONS TAB

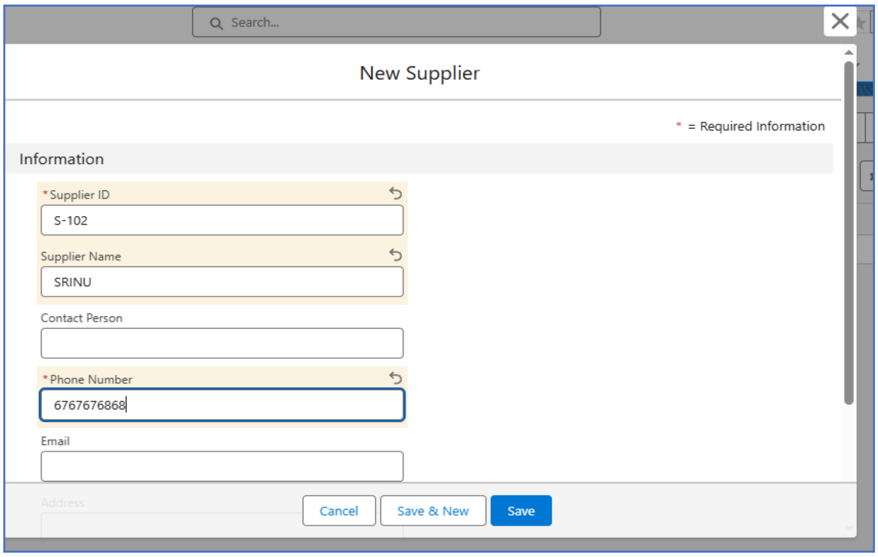


NEW INVENTORY MANAGEMENT DETAILS

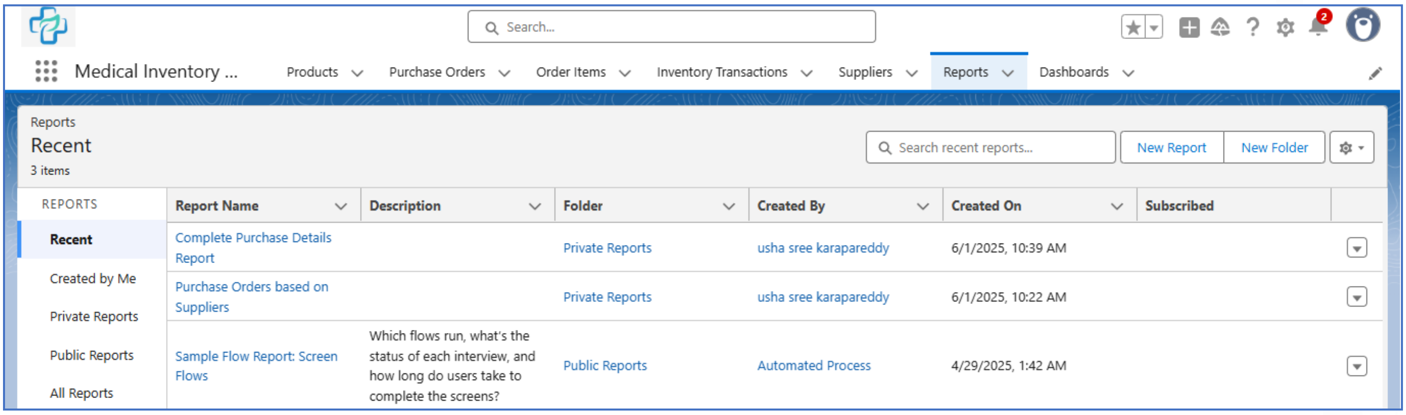


SUPPLIERS TAB

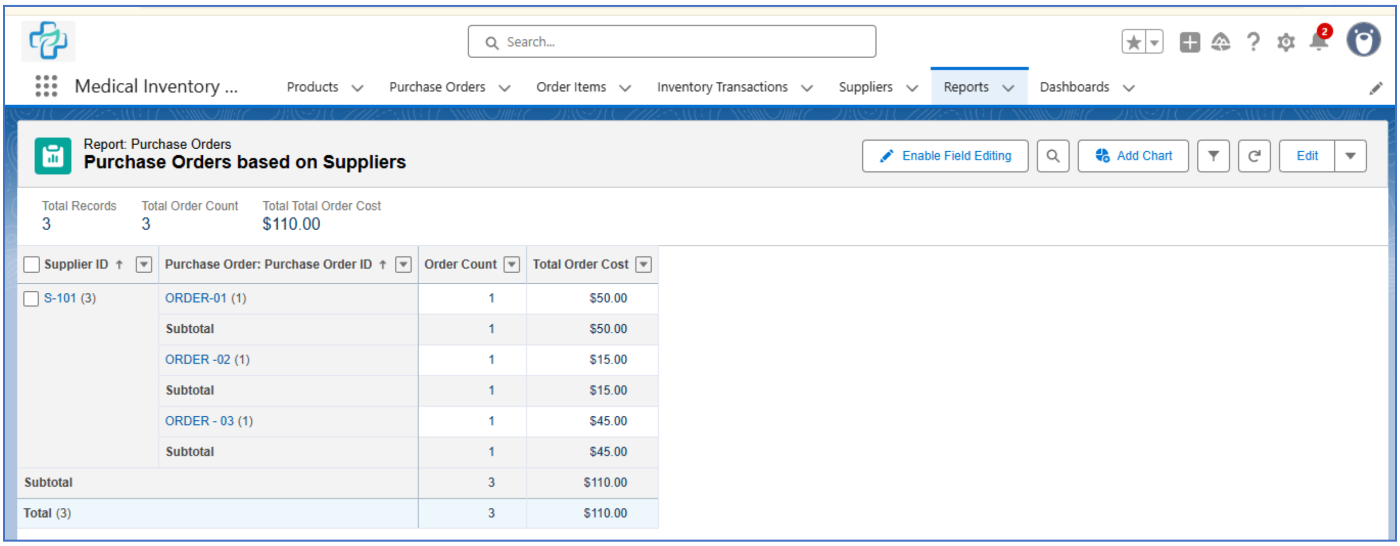
MEDICAL INVENTORY MANAGEMENT



NEW SUPPLIER DETAILS

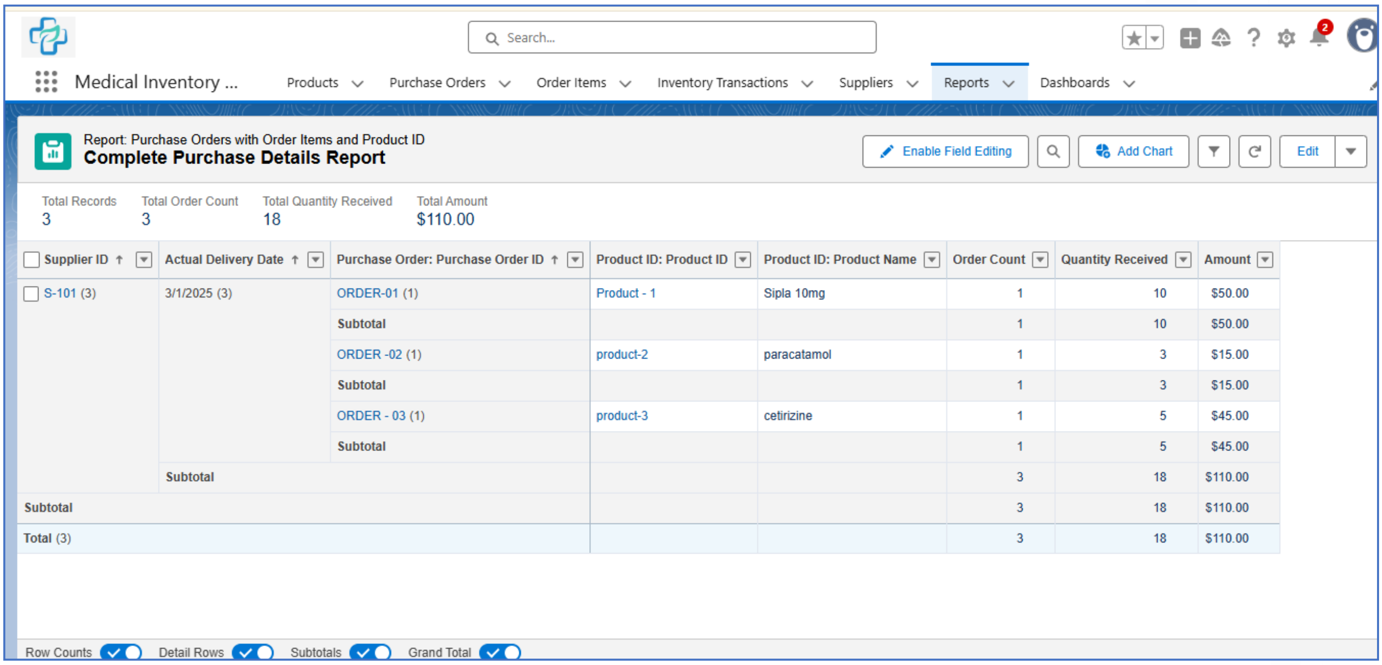


REPORTS HOME

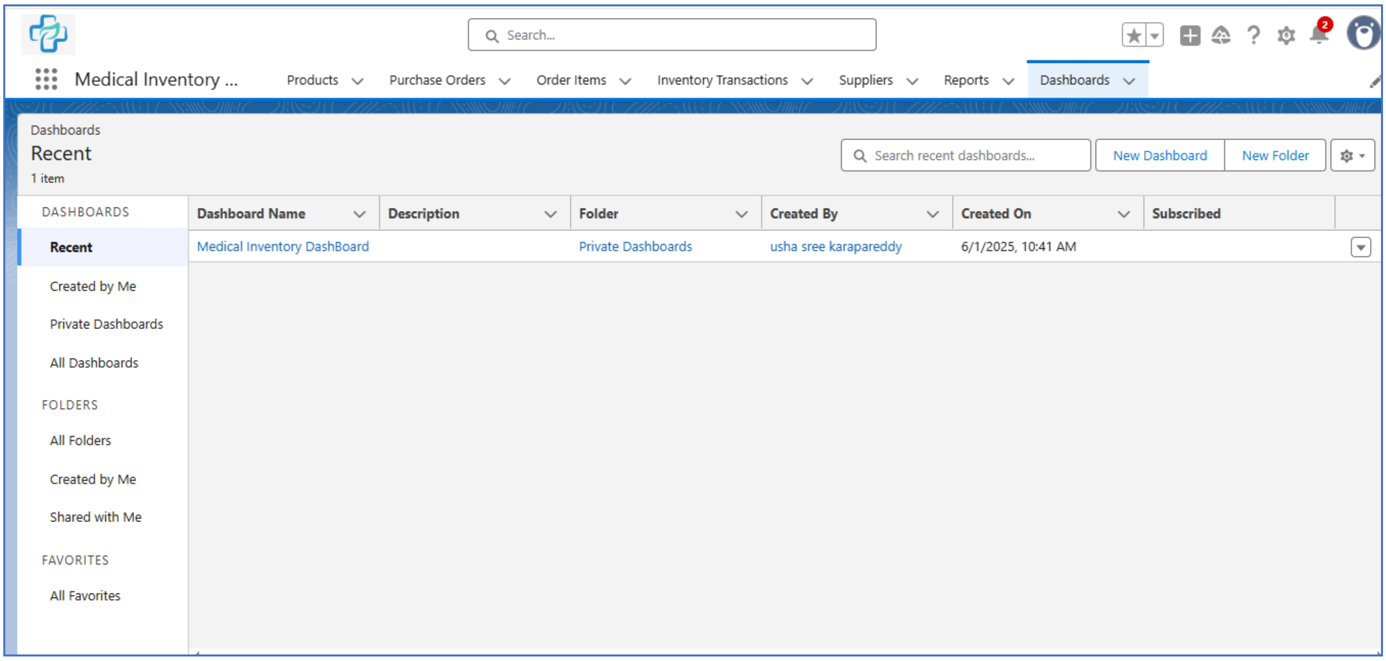


PURCHASE ORDERS BASED ON SUPPLIERS REPORT

MEDICAL INVENTORY MANAGEMENT

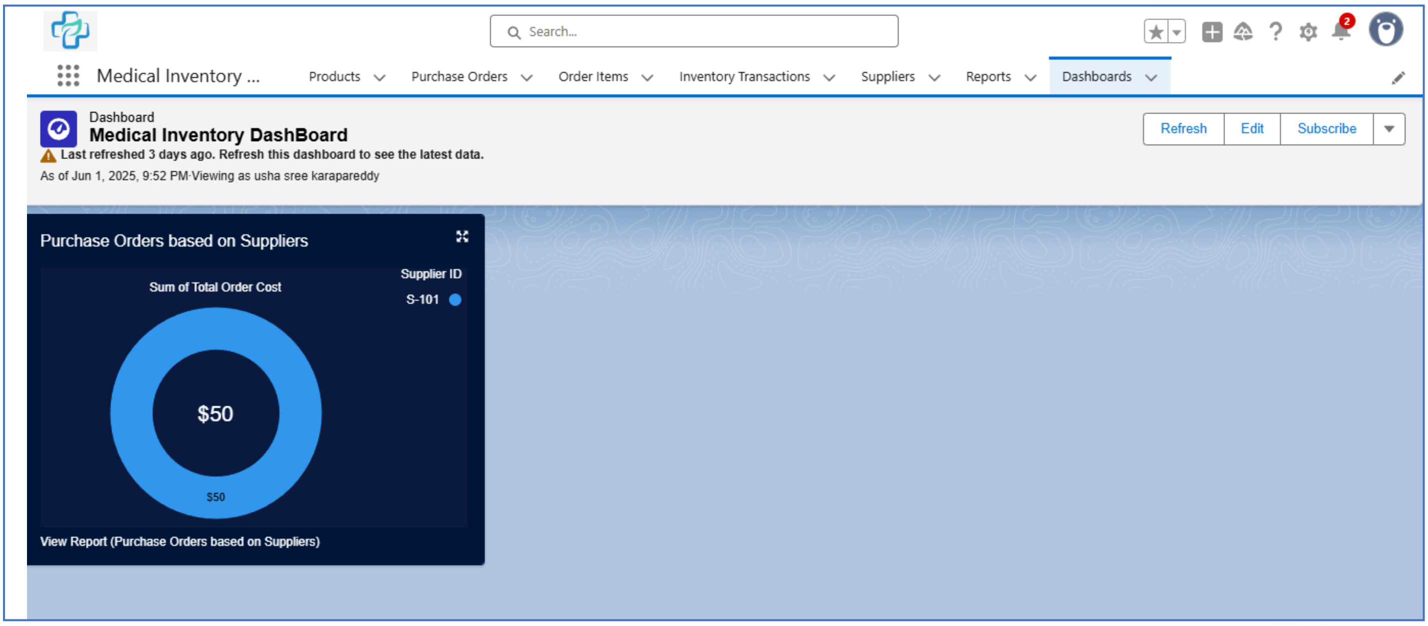


COMPLETE PURCHASE DETAILS REPORT



DASHBOARDS HOME

MEDICAL INVENTORY MANAGEMENT



MEDICAL INVENTORY DASHBOARD